INtax Tax Professionals Guide

INTAX.IN.gov
Easy · Efficient · Electronic

July 2015

Indiana Department of Revenue

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Introduction

Welcome to INtax, Indiana's free online tool to manage business tax obligations for Indiana retail sales, withholding, out-of-state sales, gasoline use taxes, metered pump sales, tire fees, fuel taxes, wireless prepaid fees, type II gaming fees, food and beverage taxes, and county innkeeper's taxes.

INtax supports the following tax forms: ST-103, ST-103MP, ST-103P, ST-103CAR, WH-1, WH-3, TF-103, SF-900, SF-401, MF-360, WPC-103, TTG-103, GT-103DR, FAB-103, and CIT-103.

INtax enables tax professionals, also known as service providers, to file and pay taxes on behalf of their clients.

Registering as an INtax service provider allows you to:

- Manage all client accounts using one convenient login
- View filing and payment histories submitted on behalf of your clients
- Communicate securely with the department regarding your clients' accounts

Register as a service provider

NOTE: If you previously registered for INtax with your own Tax ID Number as a regular INtax user, you must contact the Indiana Department of Revenue. Use the INtax message center to request your account be converted to a service provider account or call (317) 233-8729 for more information. Upon conversion, no information in your account will be effected. Service provider functionality will be added to your account.

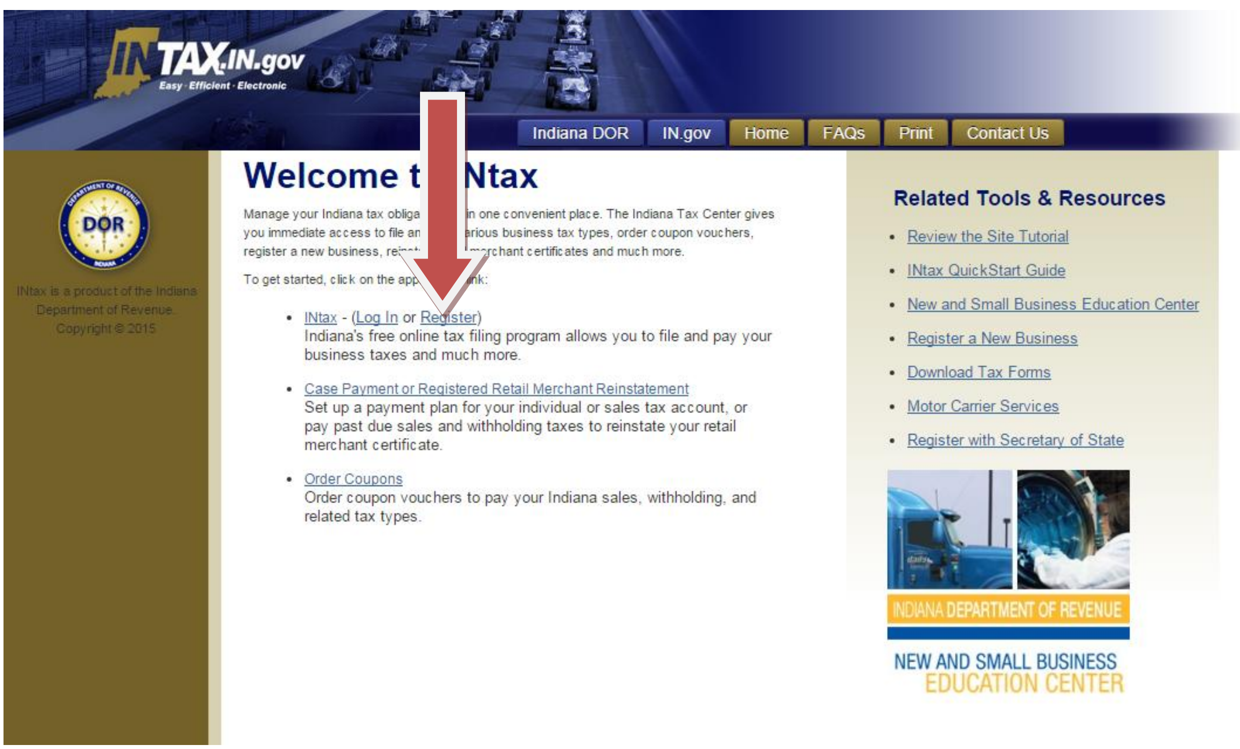
If your organization is not registered with the department for a tax type supported in INtax, you must complete a Non-Registered Service Provider Application. Call (317) 232-5500 if you have questions about being a non-registered service provider.

The following instructions guide you through the process of registering in INtax as a service provider.

Before you begin the INtax registration process, you'll need a couple items:

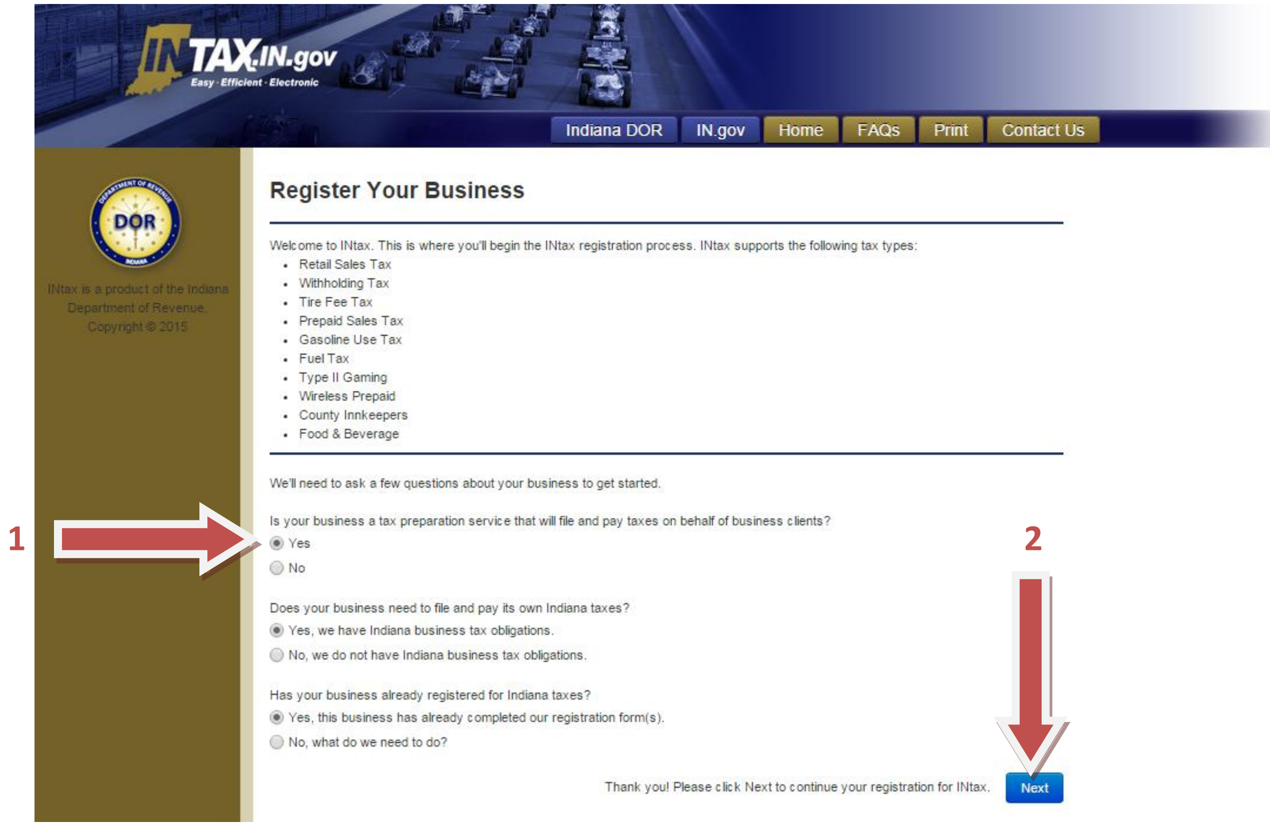
1. Your Indiana Tax Identification Number (TID). You received this when you registered your business with the state on the BT-1 business tax application.
2. Your previous tax return, payment information, or an INtax Access Code.
   Note: Using your INtax Access Code is the preferred method to verify your business.

To begin your registration, go to www.INtax.in.gov. Select **Register** in the center of the page.



When asked “Is your business a tax preparation service that will file and pay taxes on behalf of business clients?” select “Yes” (see arrow #1 below) to register as a service provider.

Answer the next two questions, and then select **Next** (see arrow #2 below)**.**



Creating your username

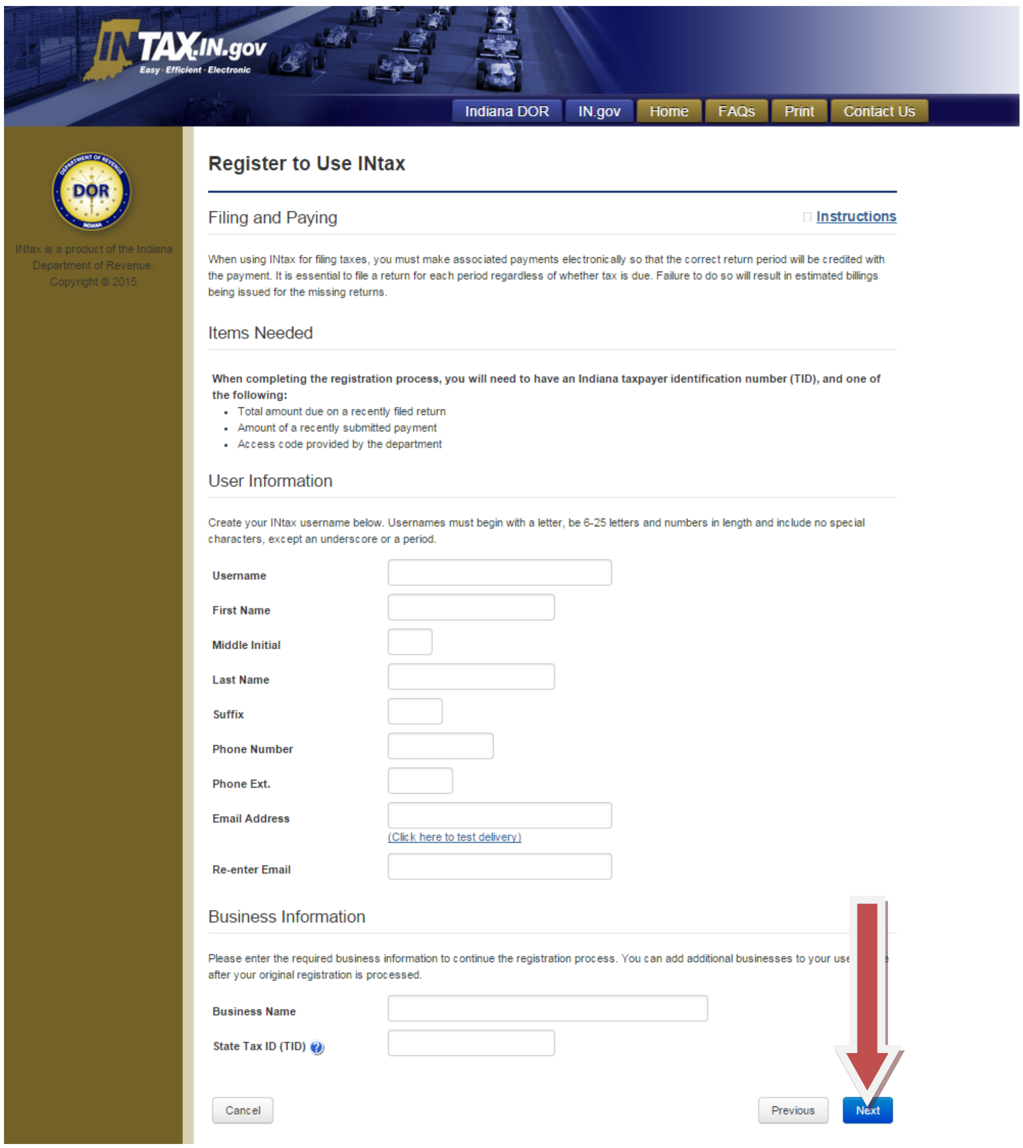
This page begins your registration. Complete all applicable fields to create your User Profile.

Create a unique username. You will use this to access your INtax User Account. Pay close attention to the requirements for creating your username. Once created, make sure you remember it for future reference.

In the User Information section, enter your name and contact information, including phone number and email address.

Then, in the Business Information section, enter your specific business information, including the business name and the state tax ID (TID).

Once you have completed each field, select **Next**.



Note: You can add additional businesses to your User Profile after your original registration is processed.

Verifying your business

Now you must verify your business. You have four verification options from which to choose:

- Previous tax return amount due
- Previous payment amount
- INtax Access Code found on your Registered Retail Merchant Certificate or department letter
- Request an INtax Access Code be sent to you via USPS

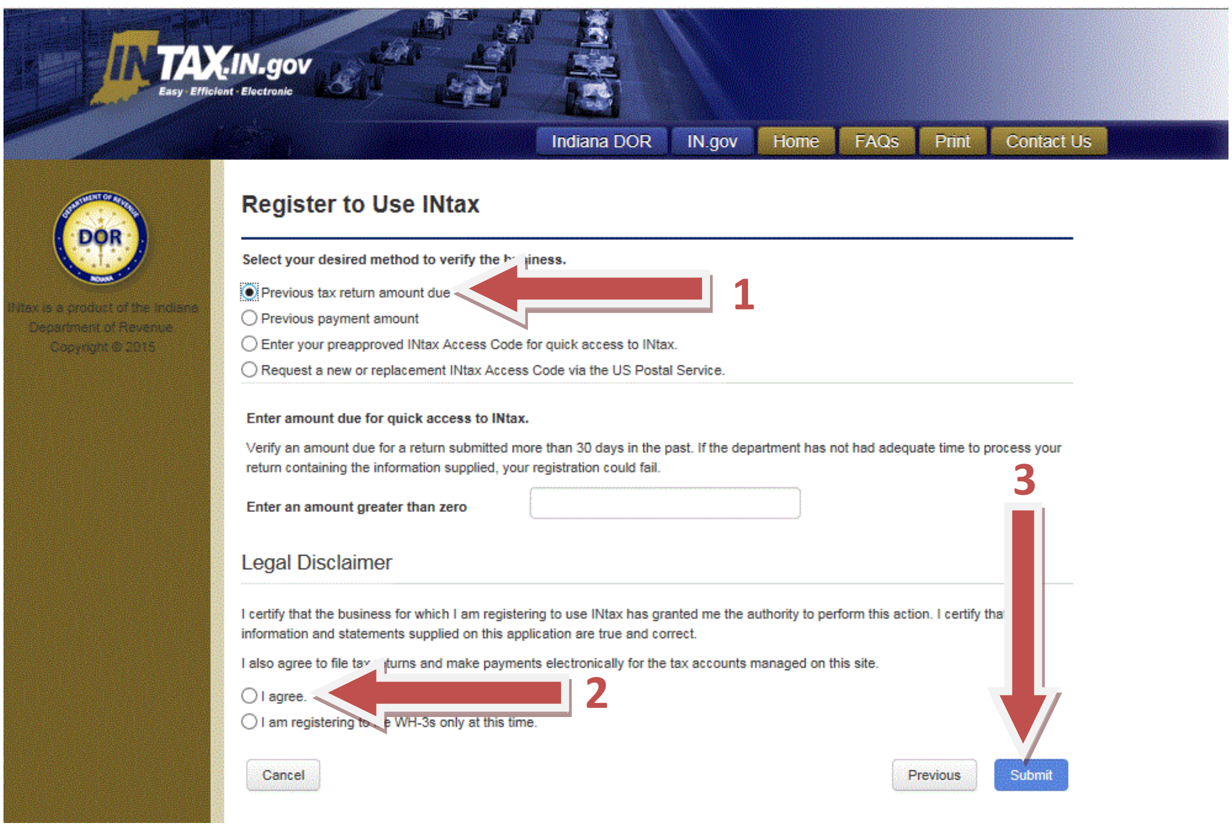
When you select one of the options, additional information appears on the page.

Note: Using your INtax Access Code is the preferred method to verify your business. If you are a non-registered service provider, your INtax Access Code will be emailed to you after your Non-Registered Service Provider Application has been processed.

Previous tax return amount due

Select the first option (see arrow #1 below) if you would like to use a previous tax return amount due to verify your business. (You must know the exact amount.) After selecting this option, a field will appear where you can enter the amount.

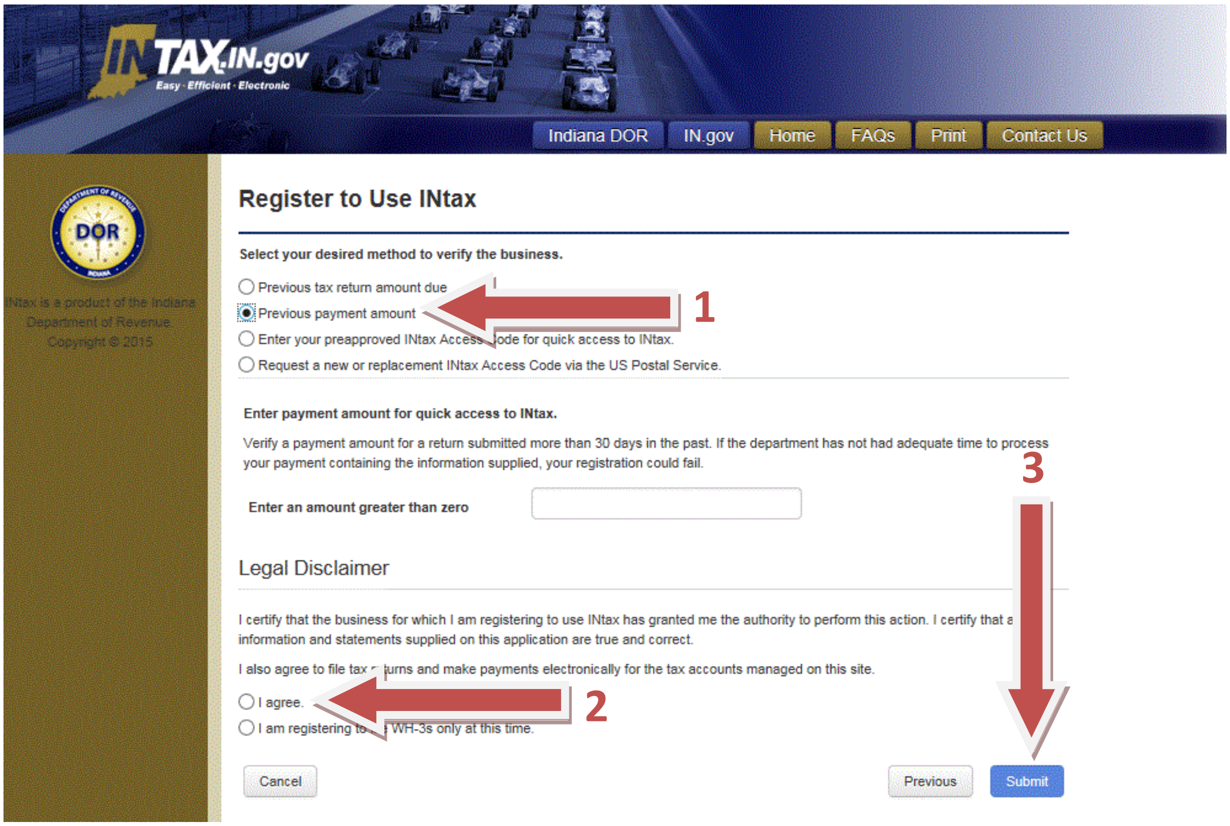
In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).



Previous payment amount

Select the second option (see arrow #1 below) if you would like to use a previous payment amount to verify your business. (You must know the exact amount.) This cannot be an amount submitted to the department in the last 30 days. After selecting this option, a field appears where you can enter the amount.

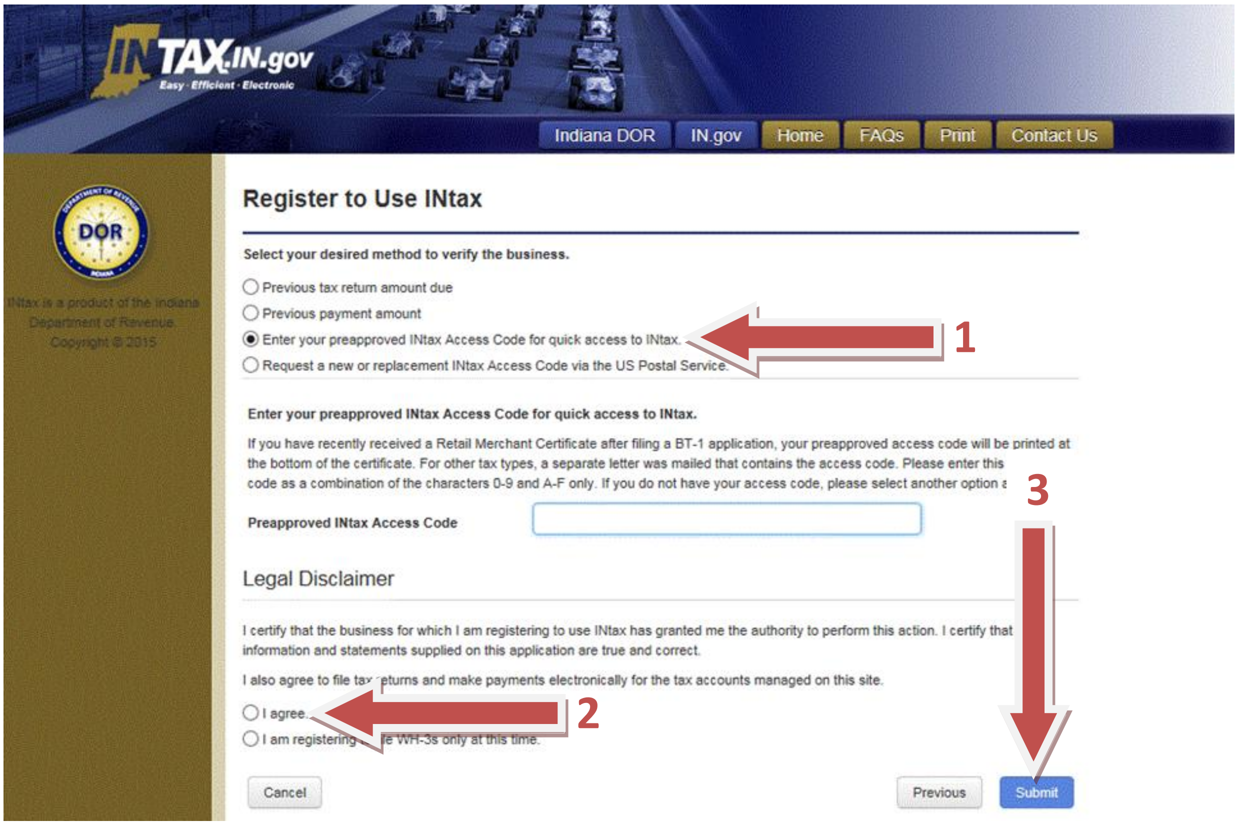
In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).



Preapproved INtax Access Code

Select the third option (see arrow #1 below) if you have an INtax Access Code, which can be found on your Registered Retail Merchant Certificate or a department issued letter, and would like to use this Access Code to verify your business. Using an Access Code is the preferred method of verifying your business. After selecting this option, a field for the Access Code appears. Enter your Access Code.

In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).



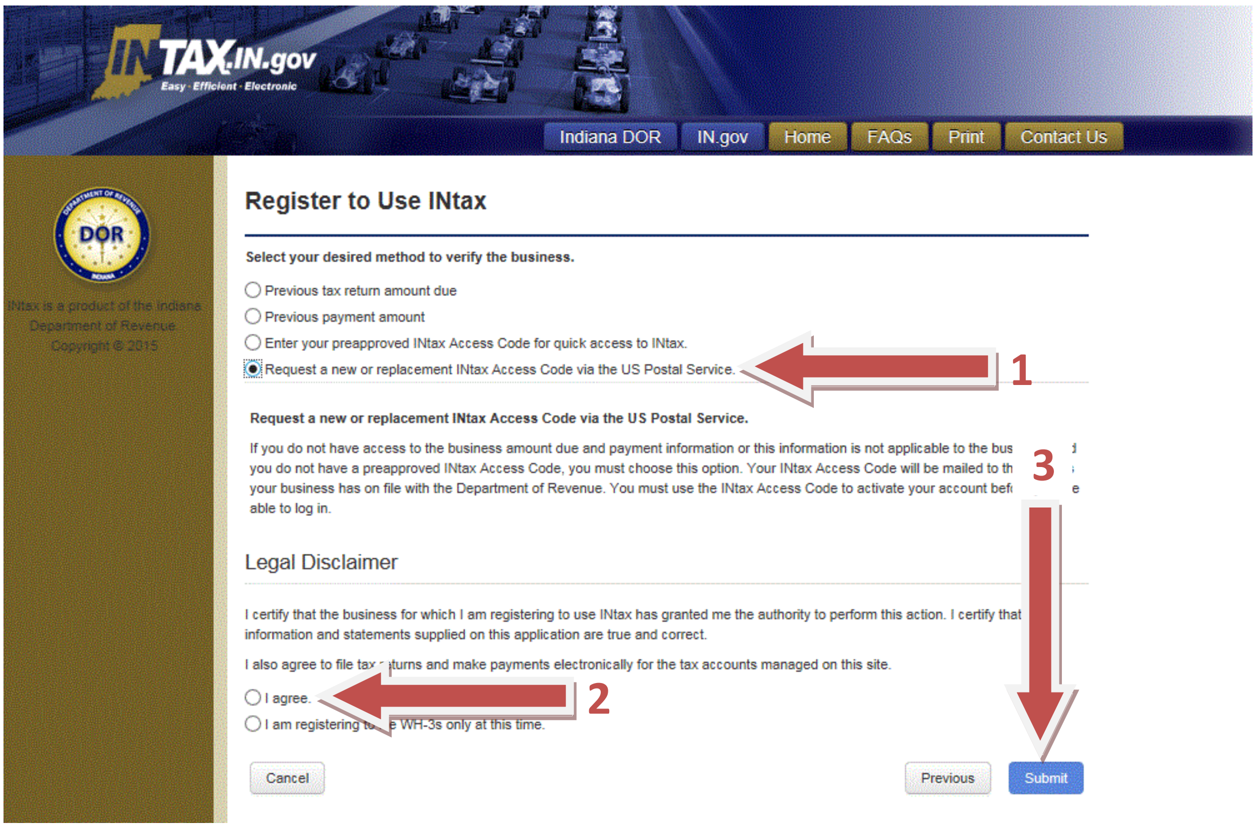
Request a replacement INtax Access Code

Select the fourth option (see arrow #1 below) if you need to have a new or replacement INtax Access Code sent to you via the United States Postal Service and would like to use this Access Code to verify your business. This option takes the longest and requires you to pause your registration until you receive your code.

Note: The INtax Access Code will be mailed within three to seven days to the address the department has on file, so be sure we have your most current address.

After you receive your Access Code, follow the instructions in the letter to complete your registration process.

In the Legal Disclaimer section, select "I agree" to certify that you are authorized to register for INtax on behalf of the business (see arrow #2 below), and then select **Submit** (see arrow #3 below).



Completing the registration

Your registration is now complete. You're almost done!

If you chose to verify your business using a previous tax return amount due, a previous payment amount, or an INtax Access Code, you are almost finished. Once the department verifies the submitted information, you will receive two emails:

- The first email confirms that your INtax registration was successful. This email also contains the username you created for your records.
- The second email contains a temporary password to access your account.

If the department cannot verify your submitted information and it is your first attempt, you will receive an email stating your registration was not successful. Following your second attempt, if the department cannot verify your submitted information, you will receive a second email and a letter indicating your registration was not successful.

If you requested a new or replacement Access Code or have had two or more failed registration attempts, the department will mail you an Access Code with specific instructions. Once you receive the Access Code, you have 30 days to complete your registration.

Log in to INtax

After you receive the confirmation emails with your username and temporary password, you can log in to INtax. Go to www.INtax.in.gov and select **Log In**.

Enter your username and temporary password, and select **Login**.

Change your temporary password

The first time you log in to INtax, the Change Password page automatically displays.

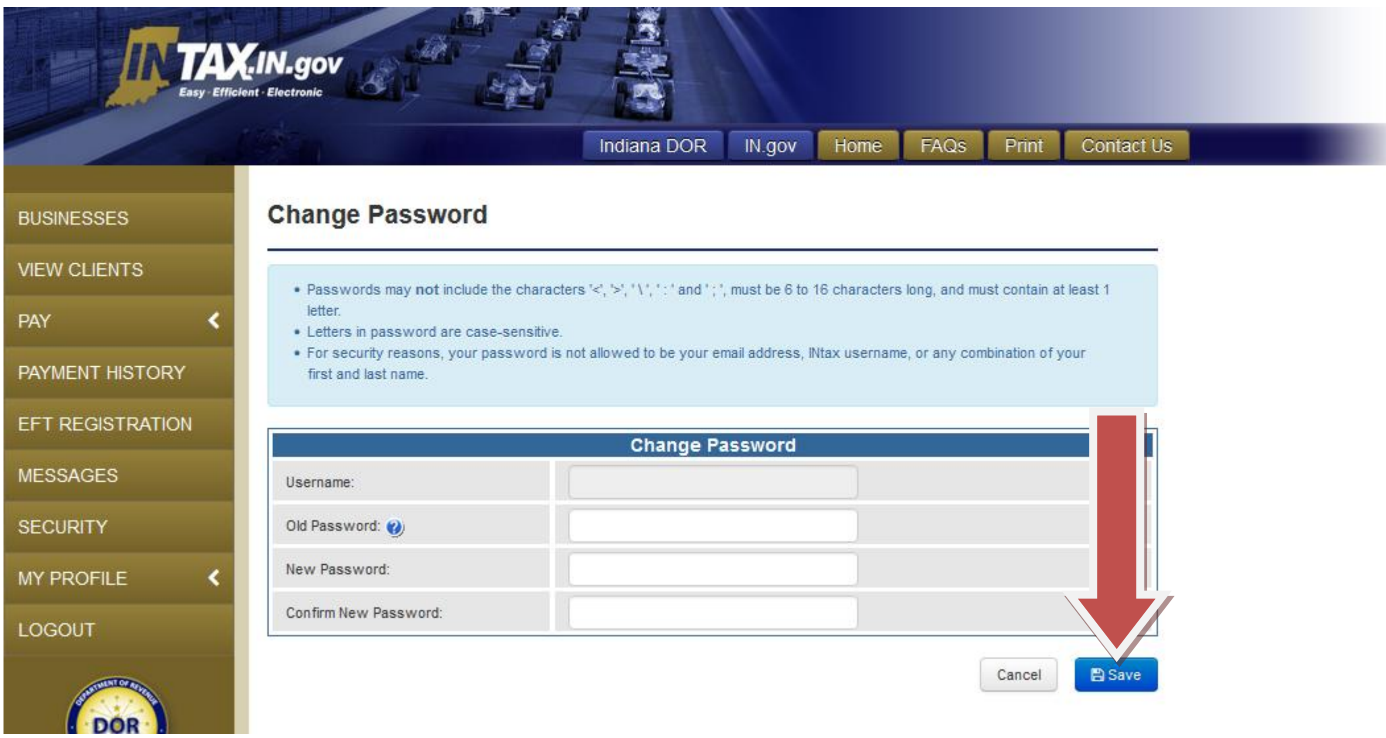
For security reasons, you need to change the temporary password provided by the department to a new password only you know. Remember your new password for future reference.

To change your password, first enter the temporary password in the Old Password field.

In the New Password field, enter the new password you would like to use. Pay close attention to the password requirements in the blue box.

Next, you have to confirm your new password by typing it again.

Once you've completed these steps, select **Save**.

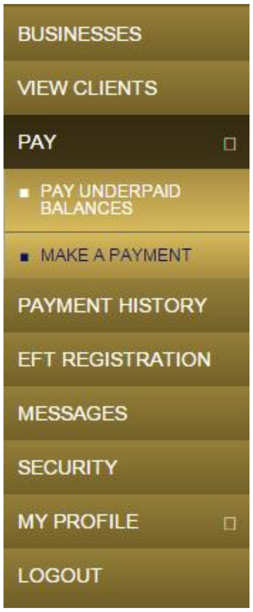


The next page confirms your password change is successful.

Navigate INtax

Left navigation menu

The left navigation menu contains links important to filing and paying taxes.



Businesses

The Businesses Details page is the default landing page when you log in to INtax. On this page, you can manage your own business account. If you have multiple businesses in your account, you must select the business account you want to manage to show the details for that business.

View Clients

The View Clients page is the homepage for managing client accounts. If you have multiple businesses of your own, you must select your service provider business from the Business Details page to display the View Clients link.

Pay

The Pay page is applicable only to your own businesses, not your clients' businesses. Pay Underpaid Account Balances lets you see all the underpaid balances for your organization regardless of whether a bill has been issued by the department. Make A Payment lets you make payment in INtax.

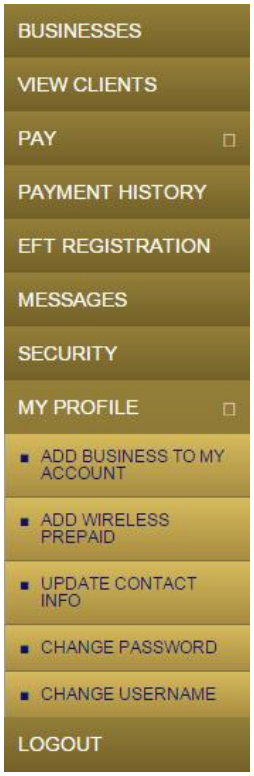
Payment History

The Payment History page is applicable only to your own businesses, not your clients' businesses. On this page, you can view previous payments and cancel or edit payments that have not been processed.

To view the payment history for your clients, you must go to the client interface by selecting View Clients.

EFT Registration

The EFT Registration page is applicable only to your own businesses, not your clients' businesses. On this page, you edit your own EFT banking information.



Messages
The Messages page is used to send and receive secure communication. You may send messages both on behalf of your own businesses and your clients' businesses.

Note: Be sure to specify in the message which account you are referencing.

Security
The Security page enables you to add users and control user access to both your own business accounts and your clients' business accounts.

Security scenarios are covered in detail on page 17 of this guide.

My Profile
INtax accounts are specific to a user rather than a business, so the My Profile page lets you control the settings for your own INtax account (the one associated with your username and password).

CAUTION: Do not select Add a Business to My Account to add a client account. If you do, the account will be added to your login permanently and listed as if it were your own business. Instead, to add a client, follow the procedure on page 22 of this guide.

Top navigation menu

The top navigation menu is the same from page-to-page and has links to helpful resources:

- **Indiana DOR** takes you to the Department of Revenue homepage.
- **IN.gov** takes you to the state of Indiana homepage.
- **Home** takes you to the INtax homepage, also called the Business Details or Business List page depending on the specifics of your INtax account.
- **FAQs** takes you to the Frequently Asked Questions page, which can help answer any questions you may have.
- **Print** creates a printer friendly version of the page you are viewing.
- **Contact Us** displays the various ways to contact the department.

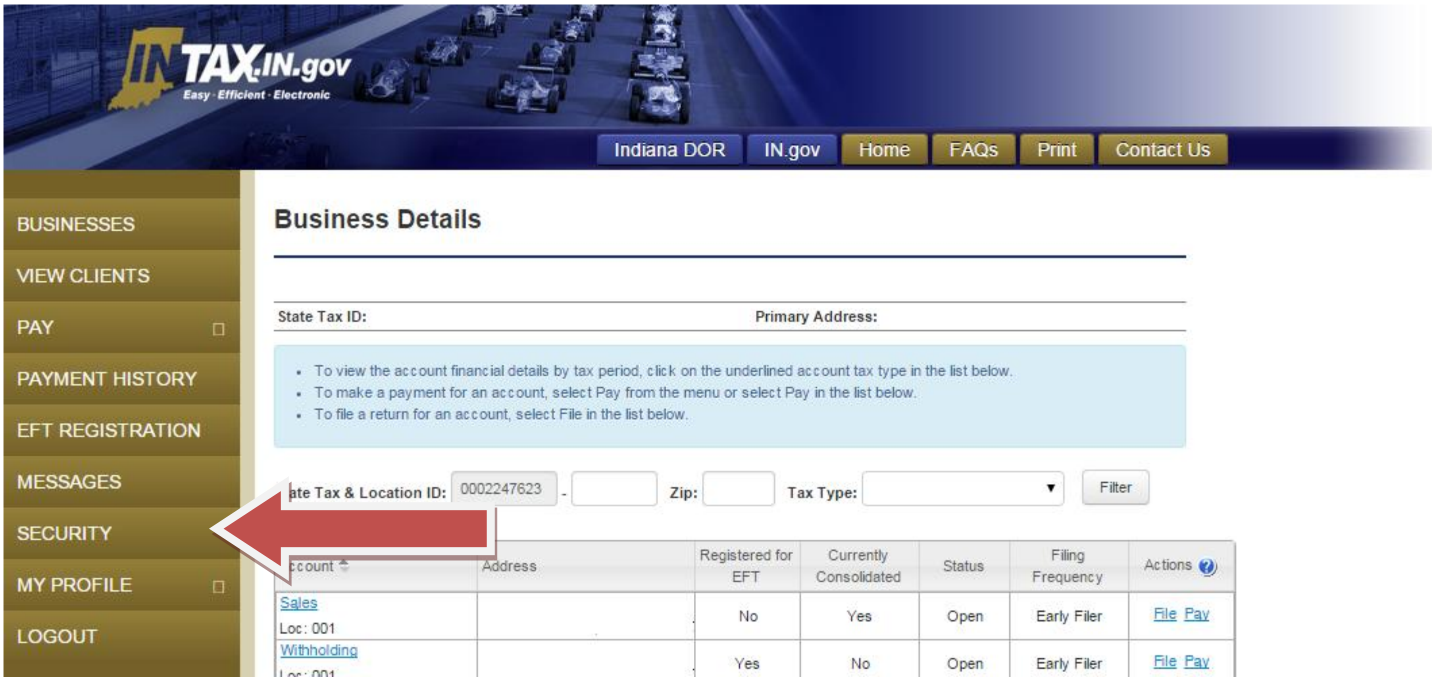
Manage security

Many service providers need to add users and control the level of access for each user. From the Security page, you can add and delete users and manage their security rights to an account.

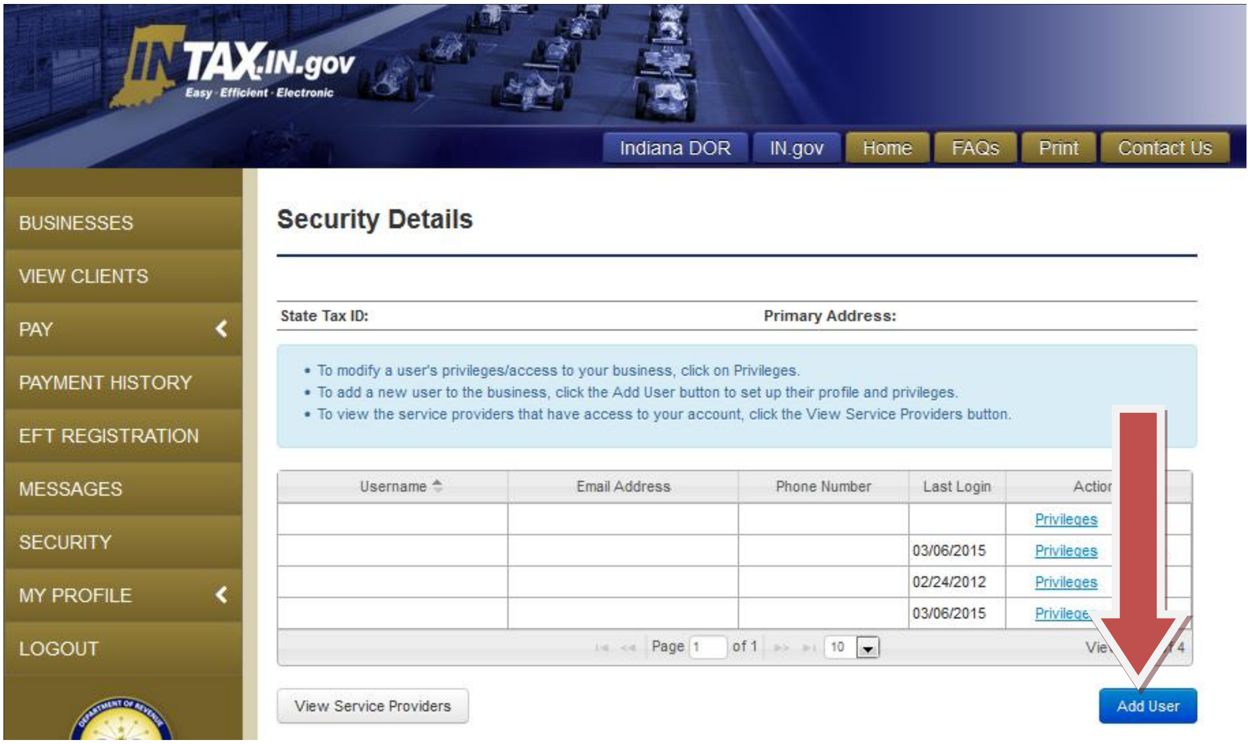
Add a user

To add a user, follow these steps:

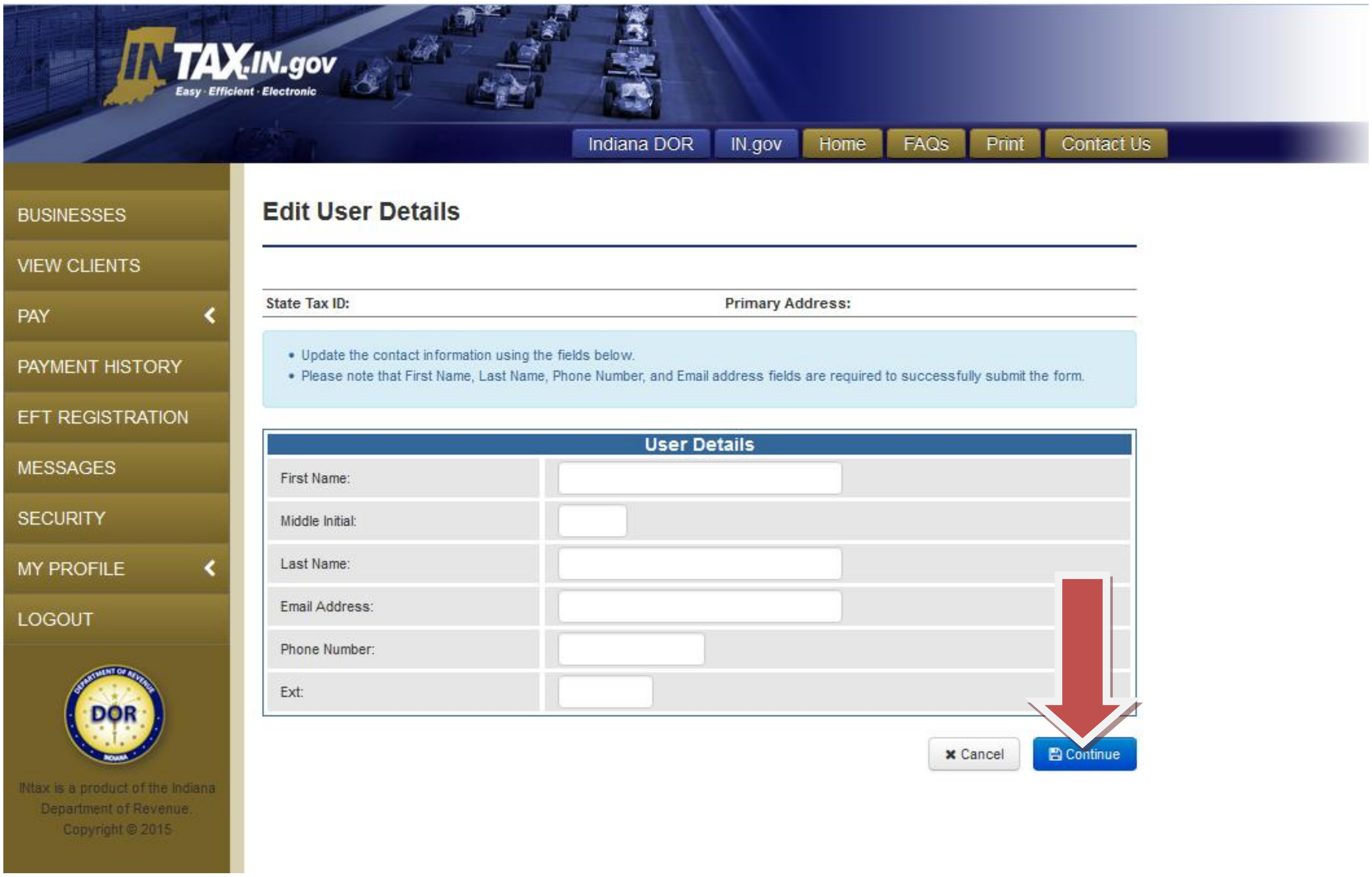
Step 1: From any page in INtax, select **Security**.



Step 2: Select **Add User**.



Step 3: Enter the first name, last name, email address, and contact phone number of the user you wish to add. Select **Continue.**



You are able to set specific business level privileges for each user. The following pages of this guide will explore how to assign users different levels of access.

Assign user access

Step 4: After you select **Continue** on the Edit User Details page (see page 19 of this guide), the User Business Privileges page displays.

Allow a user complete access

Select administrative to grant the user complete access. Administrative level privileges include the ability to use INtax as if the user is the business owner, which allows the user to change access for other users. A user granted administrative level privileges will have access to both your business account and those of your clients.

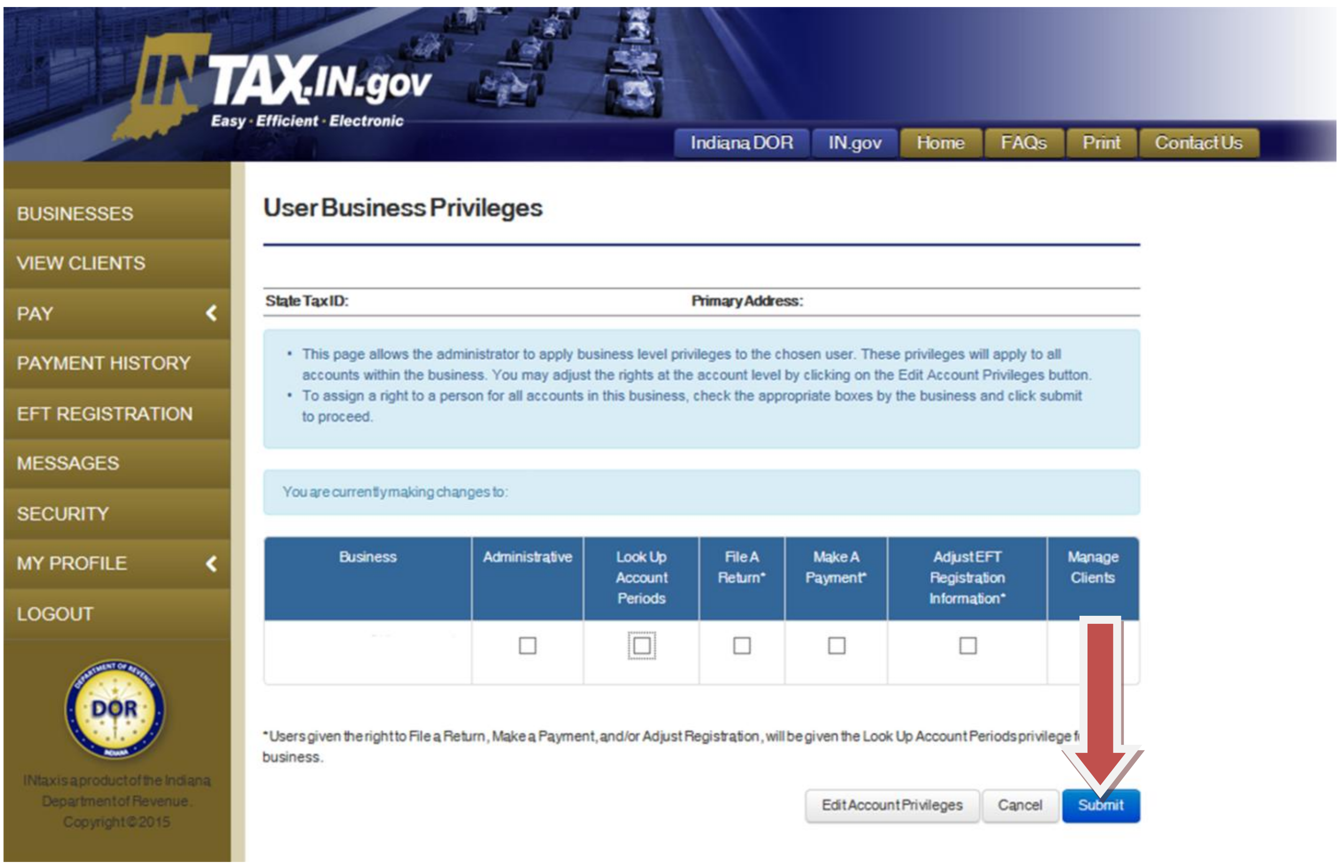
Allow a user access to all accounts but not to security settings

Users assigned the right to file a return, make a payment, or adjust EFT registration also are assigned the right to look up account periods for your business account. This user would not have access to look up account periods for clients.

Allow a user access to client accounts only

Select Manage Clients to allow the user to file and pay on behalf of clients' businesses. The user will not be able to access information for your own business account (the service provider account).

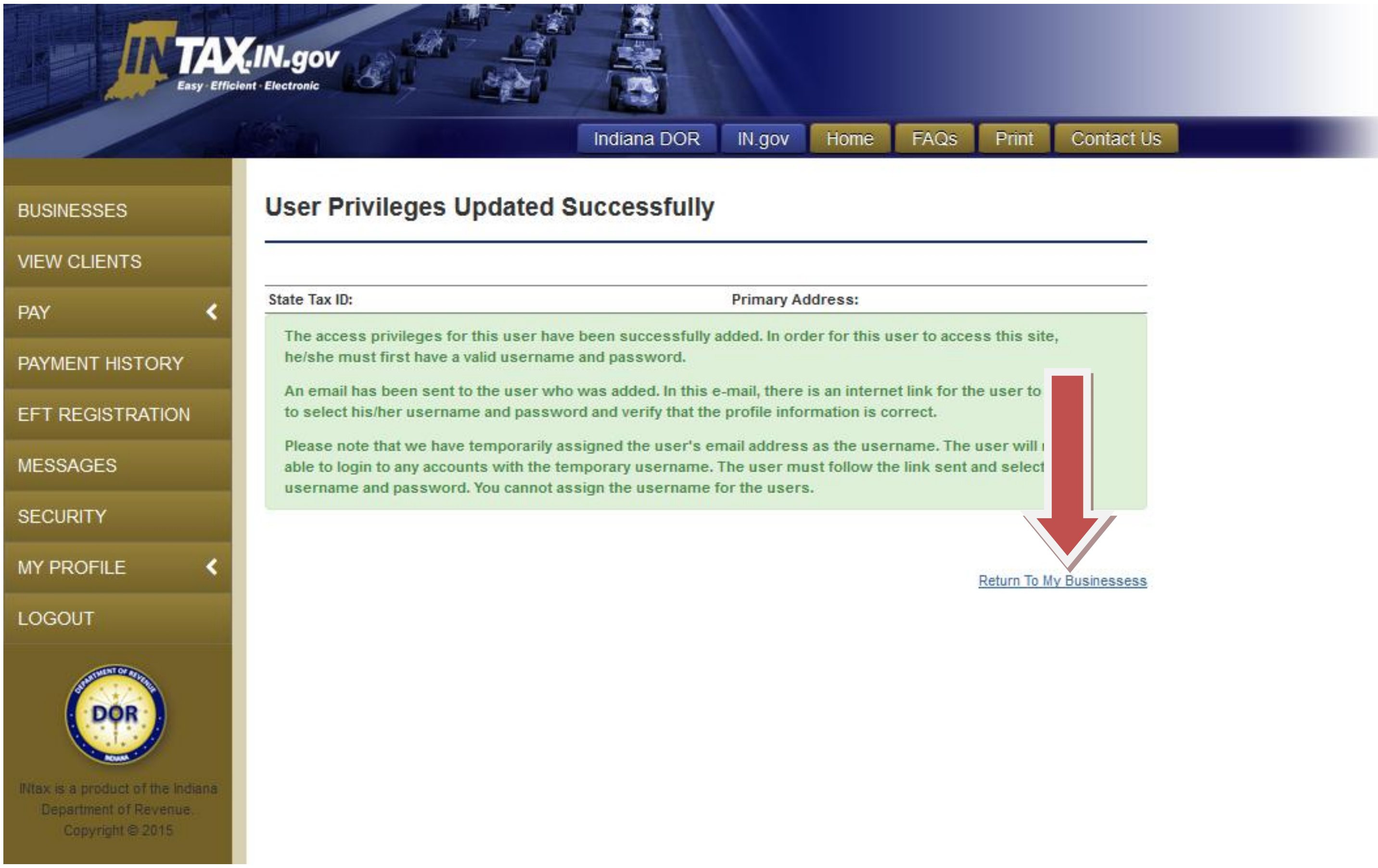
Once you have assigned the appropriate business level privileges to the user, select **Submit**.



Step 5: The next page confirms the user has been added with the selected user privileges.

INtax sends an email to the newly added user. This email contains a link, which allows the new user to create his own username and password to log in to INtax.

Select **Return to My Businesses** to add an additional user.

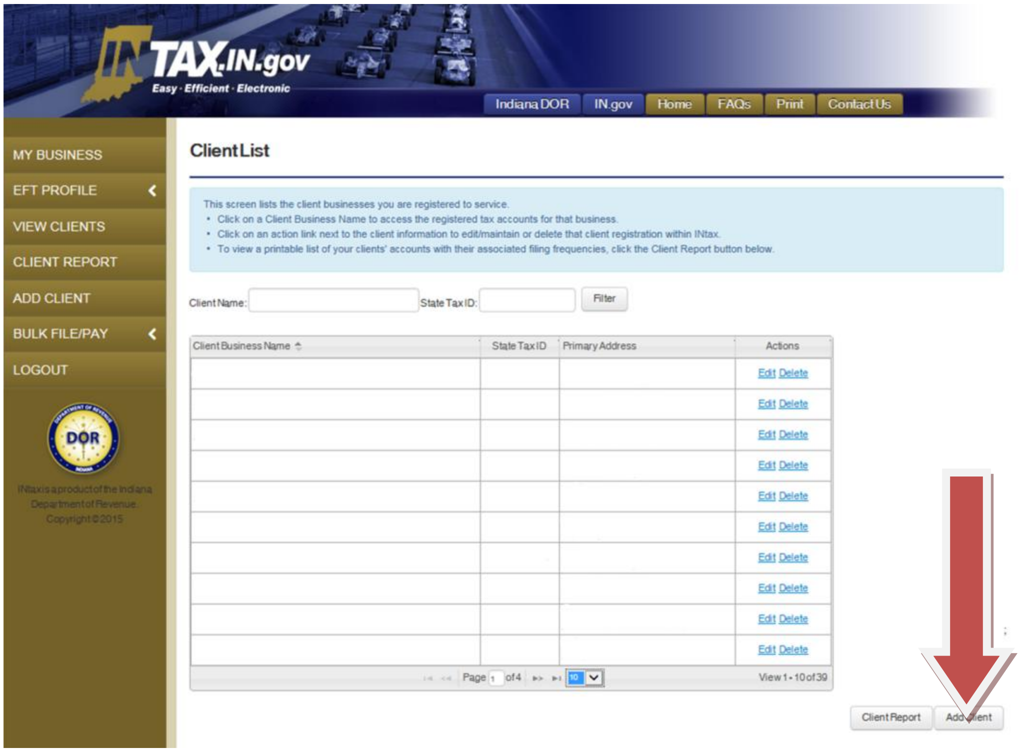


Add a client

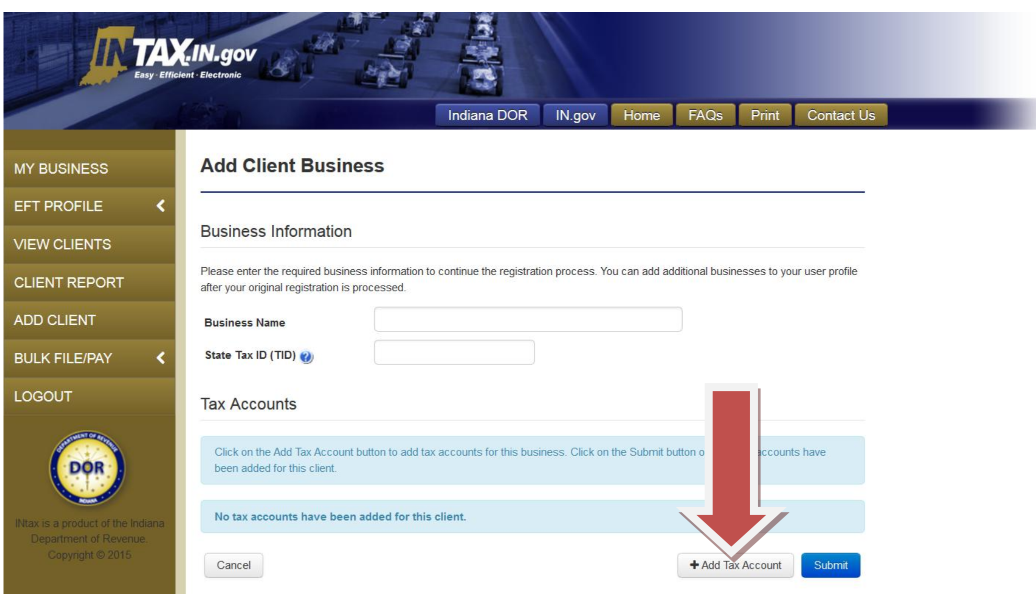
Note: To access the Client List page, select View Clients from the left navigation menu.

To add a client, follow these steps:

Step 1: Select **Add Client**.



Step 2: Enter the client's business name and State Tax ID (TID) number. Select **Add Tax Account** to add a tax account to the client business. You must add at least one tax account when adding a new client.

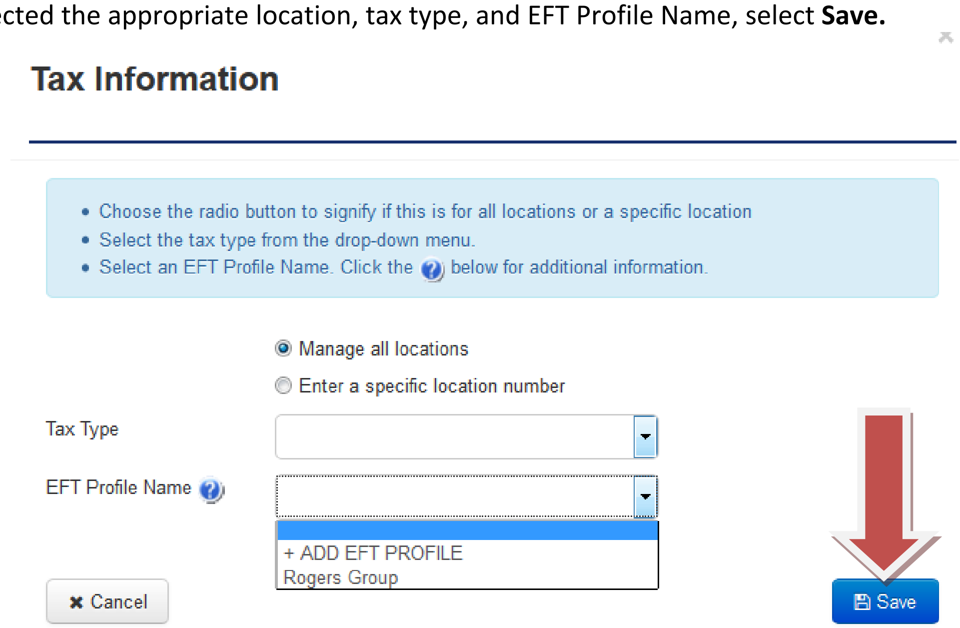


Step 3: Some clients may have multiple locations. You can assign a different Electronic Funds Transfer (EFT) profile to each location. The "Manage all locations" radio button will apply the indicated tax type and related EFT profile to all locations. By selecting the "Enter a specific location number" radio button, you can assign the indicated tax type and EFT profile to that specific location. (You will be asked to enter the location number.)

Note: If you select "Manage all locations" for a tax type when adding a client and later decided to assign information for different locations, you first must delete the existing client registration.

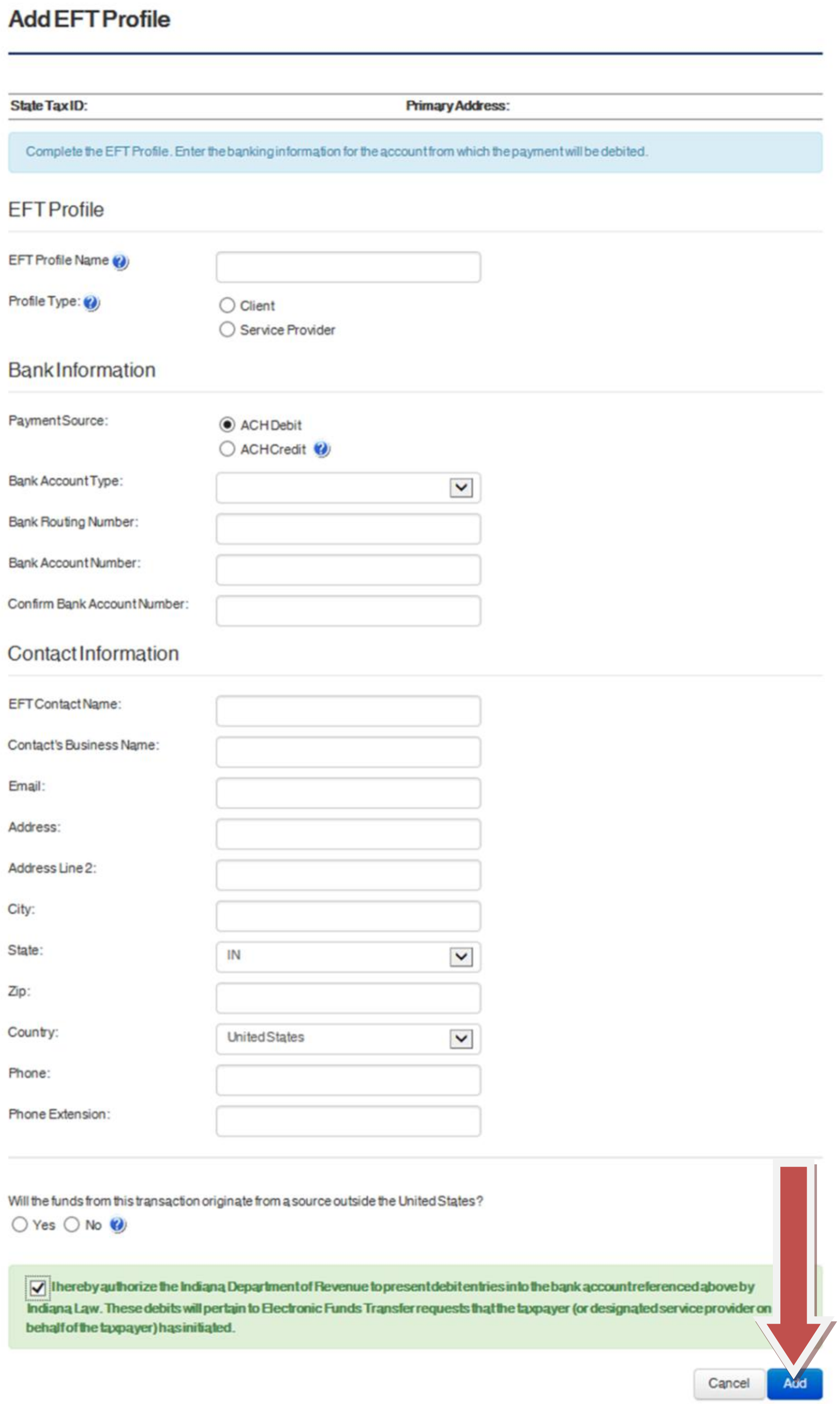
Select the EFT Profile Name you would like to use for this tax account on behalf of the client. If you need to create a new EFT profile, select **+ ADD EFT PROFILE** from the dropdown menu. If you are using a previously registered EFT profile, skip to Step 7.

Once you have selected the appropriate location, tax type, and EFT Profile Name, select **Save.**

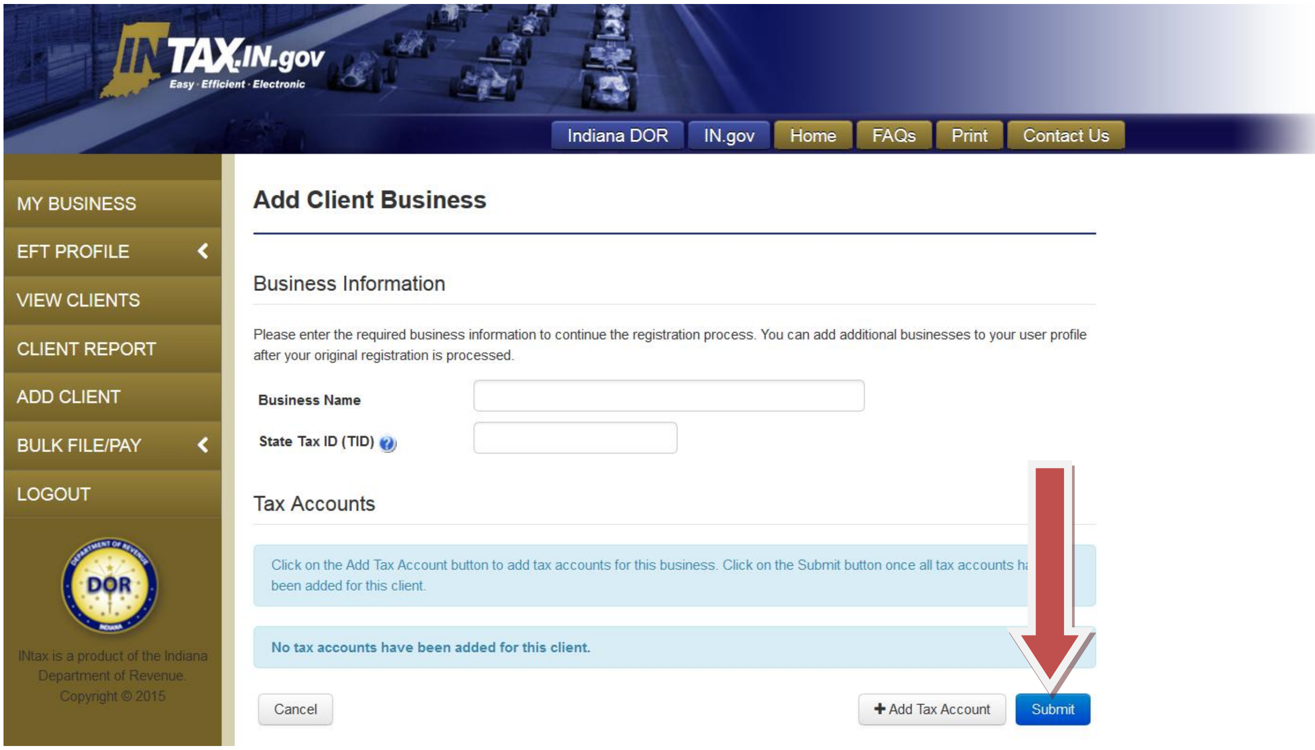


Step 4: If you selected **+ ADD EFT PROFILE** from the dropdown menu, the Add EFT Profile page appears. Enter the required bank and contact information and select **Add**. Don't forget to check the box at the bottom to authorize the department to debit the bank account.

Note: Name each EFT Profile so it describes the bank account it represents. Avoid choosing generic names like EFT Profile 1. Doing so can increase the likelihood of accidentally debiting the wrong client account.



Step 5: You may add more tax type accounts to this client. You may assign a different EFT profile for each tax type. Once you are finished, select **Submit** to add the new client. A page confirming the client is added to your profile will appear once the department has verified the business information.



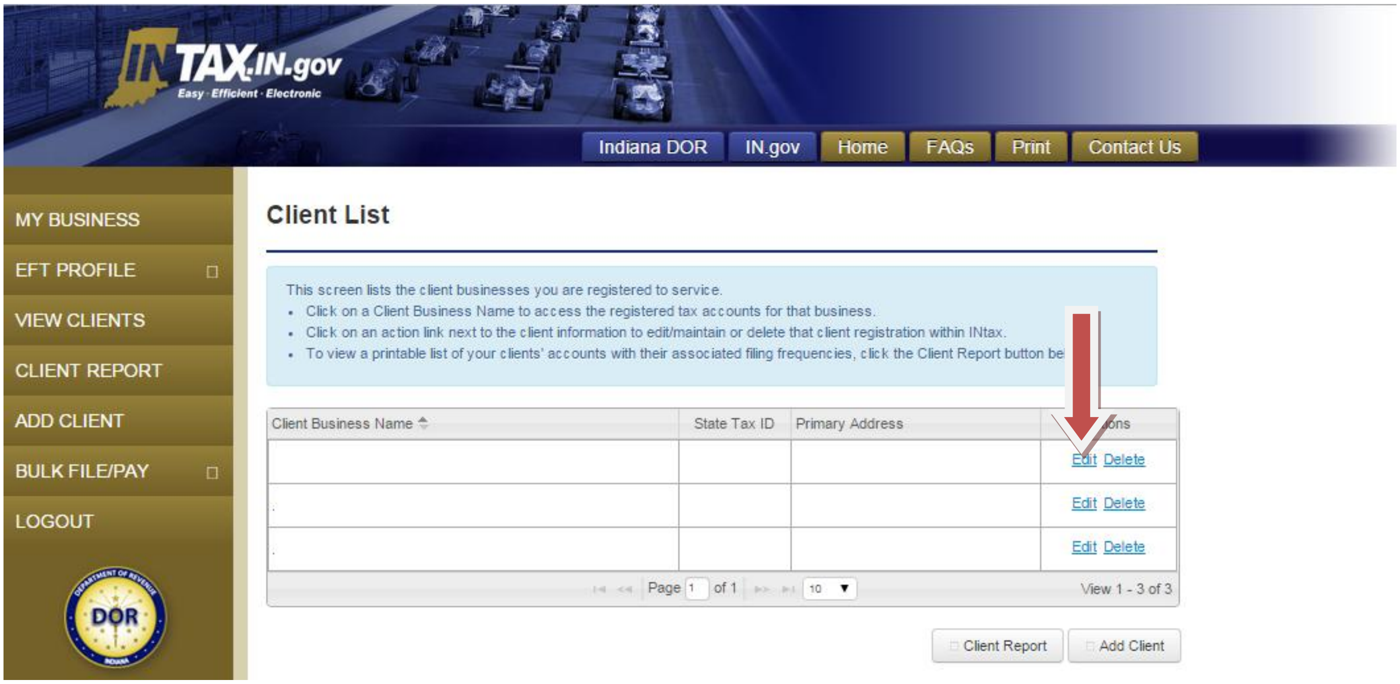
Once a client has been added, you can add additional tax accounts to the existing client account. See page 26 of this guide for step-by-step instructions.

Add a tax account to an existing client

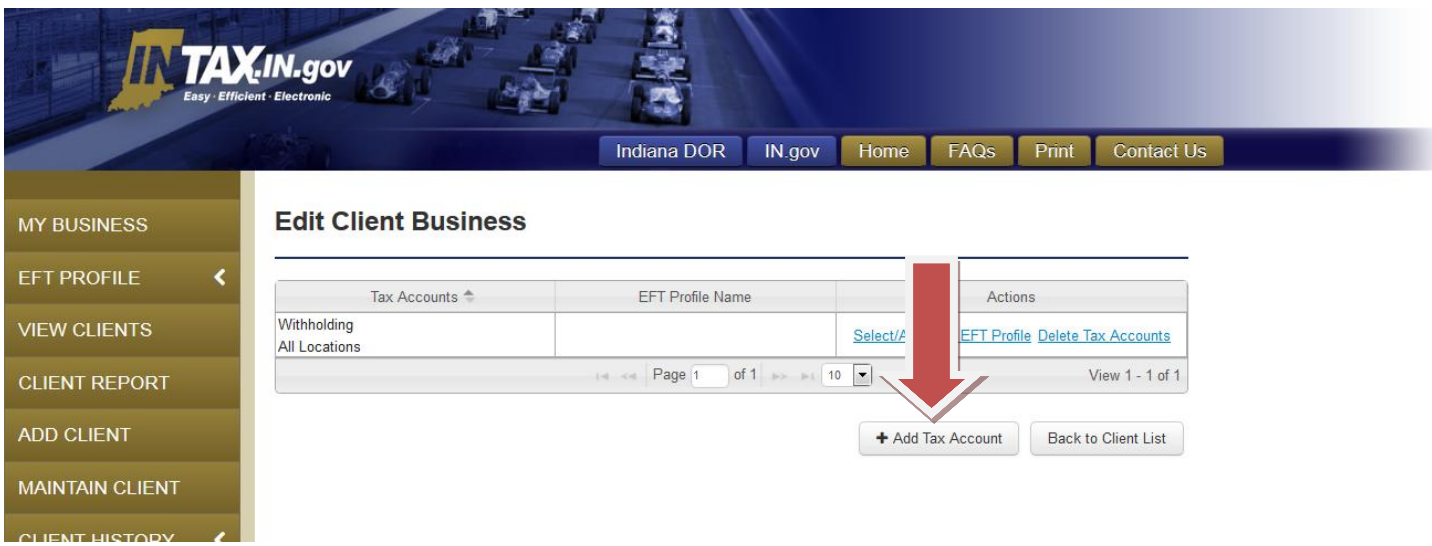
Note: To access the Client List page, select View Clients from the left navigation menu.

You can add a tax account to an existing client. To add a tax account, follow these steps:

Step 1: For the appropriate Client Business Name row, select **Edit** in the Actions column.



Step 2: Select **+ Add Tax Account**.



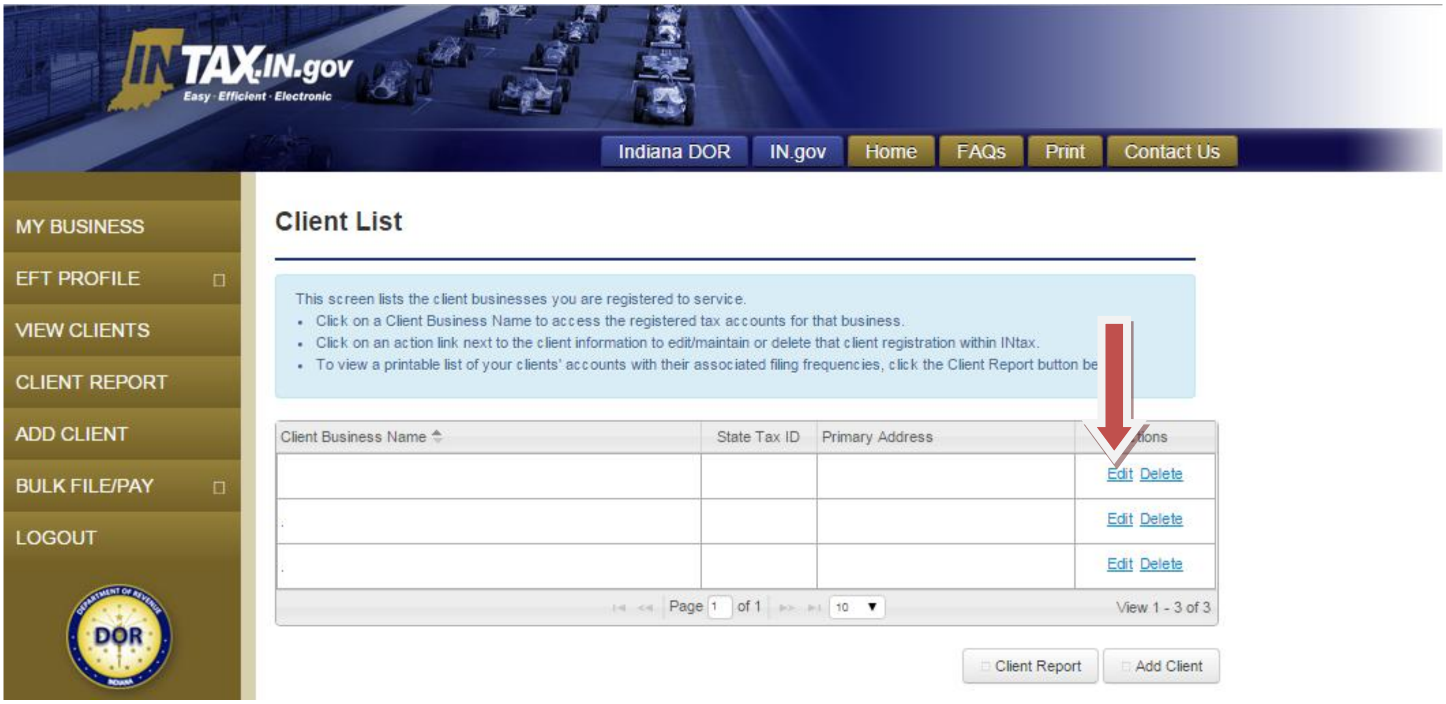
Step 3: Follow the steps beginning on page 23 of this guide to add the tax type account.

Edit EFT profile for existing client

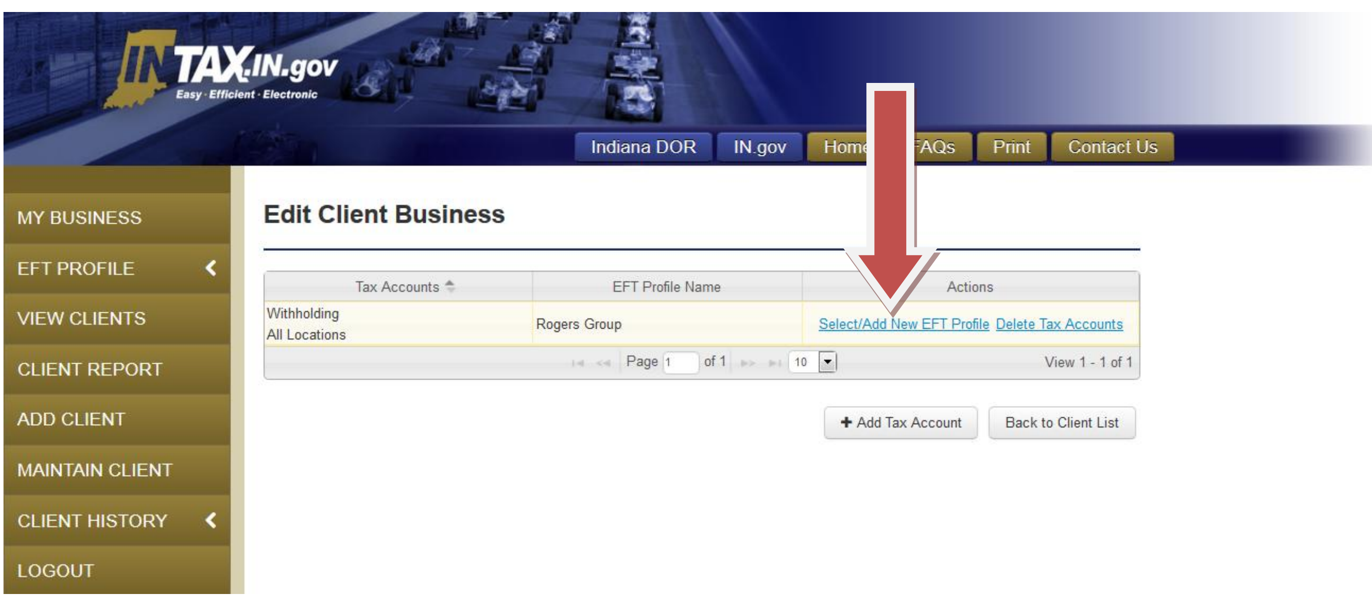
To access the Client List page, select View Clients from the left navigation menu.

You can edit the EFT profile information for an existing client. To edit the EFT profile information, follow these steps:

Step 1: For the appropriate Client Business Name row, select **Edit** in the Actions column.



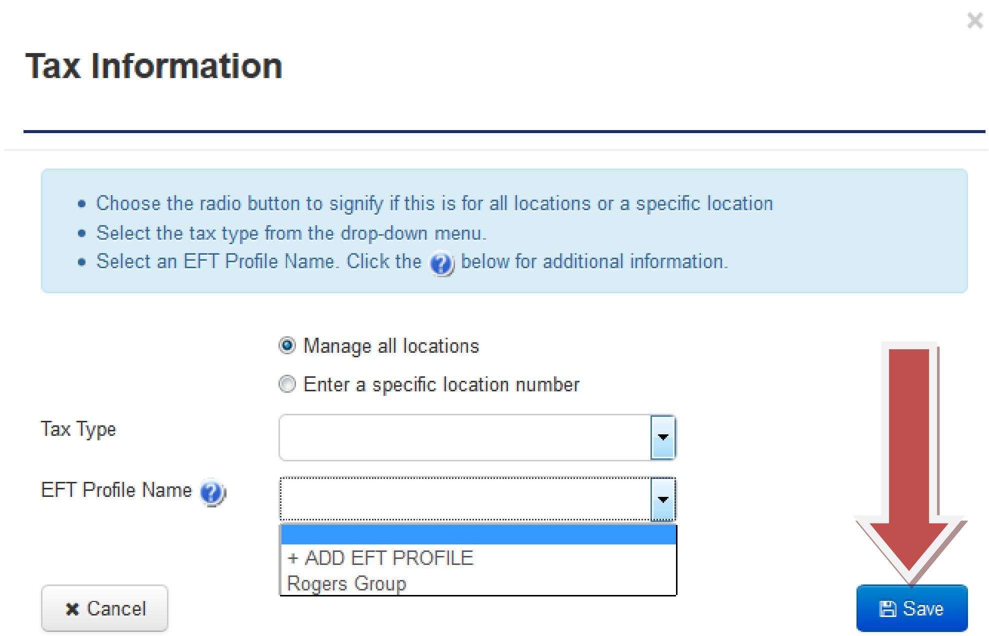
Step 2: Select **Select/Add New EFT Profile** in the Actions column of the row that corresponds to the location and tax account you wish to edit.



Step 3: From the Tax Information page, choose the EFT Profile Name you wish to edit. Select **Save.**

Note: Changing the EFT profile information will affect all accounts using this EFT profile. If you need to make changes for a single client, make sure that same EFT profile is not assigned to other clients.

If a payment is scheduled before you make a change to an EFT profile, that payment still will be presented to the bank with the information on file at the time the payment was scheduled. If the payment needs to be made with the updated information, you should cancel the previously scheduled payment and reinitiate the payment.

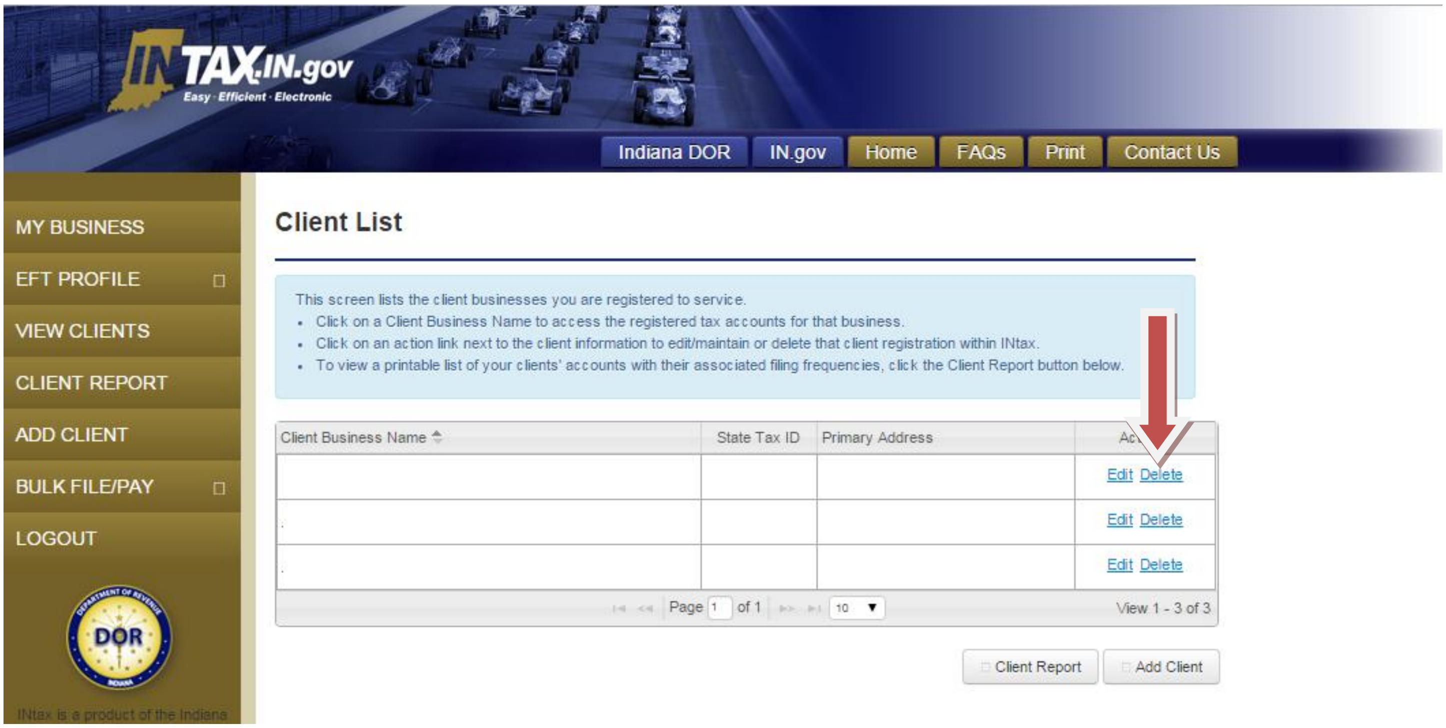


Delete a client

To access the Client List page, select View Clients from the left navigation menu.

For the appropriate Client Business Name row, select **Delete** in the Actions column. You will receive a pop-up window after selecting **Delete**. Select **OK** to proceed.

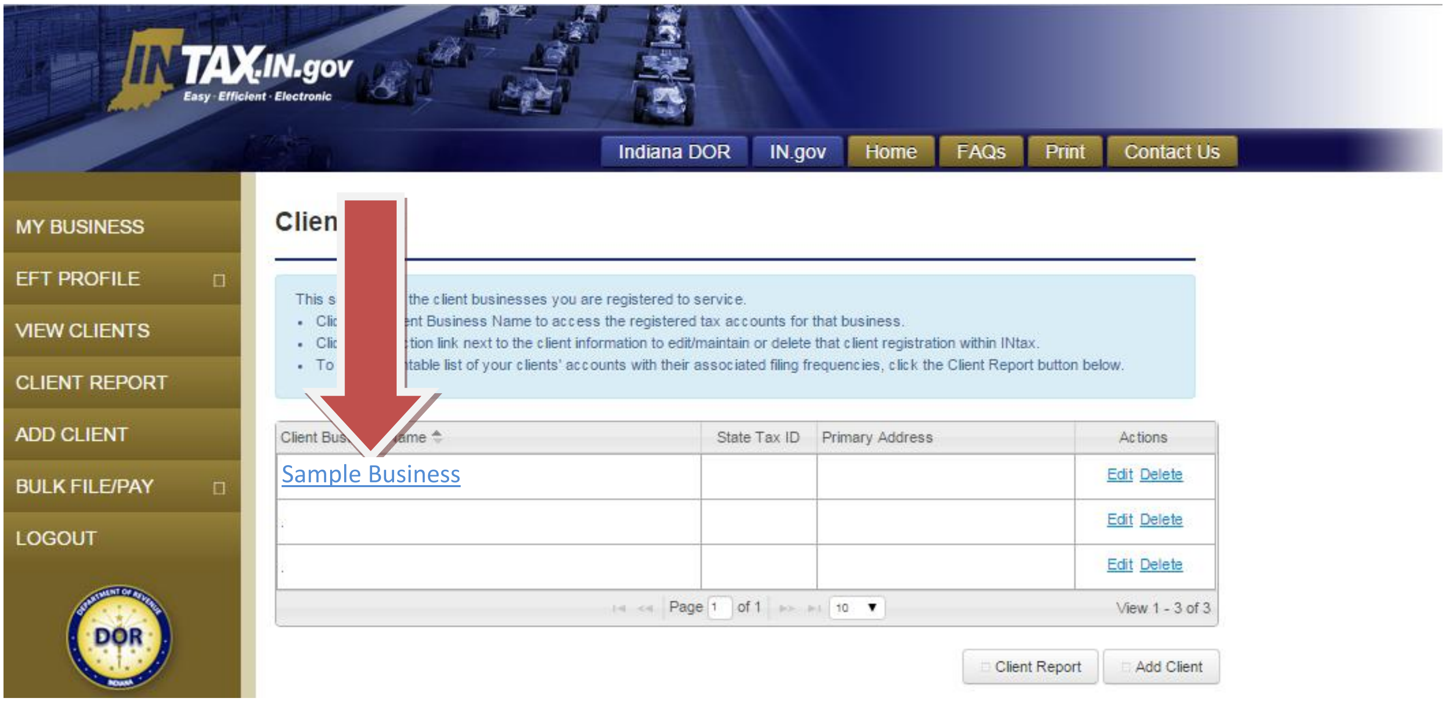
Note: Make sure you want to delete this client. Deleting the client removes the client completely.



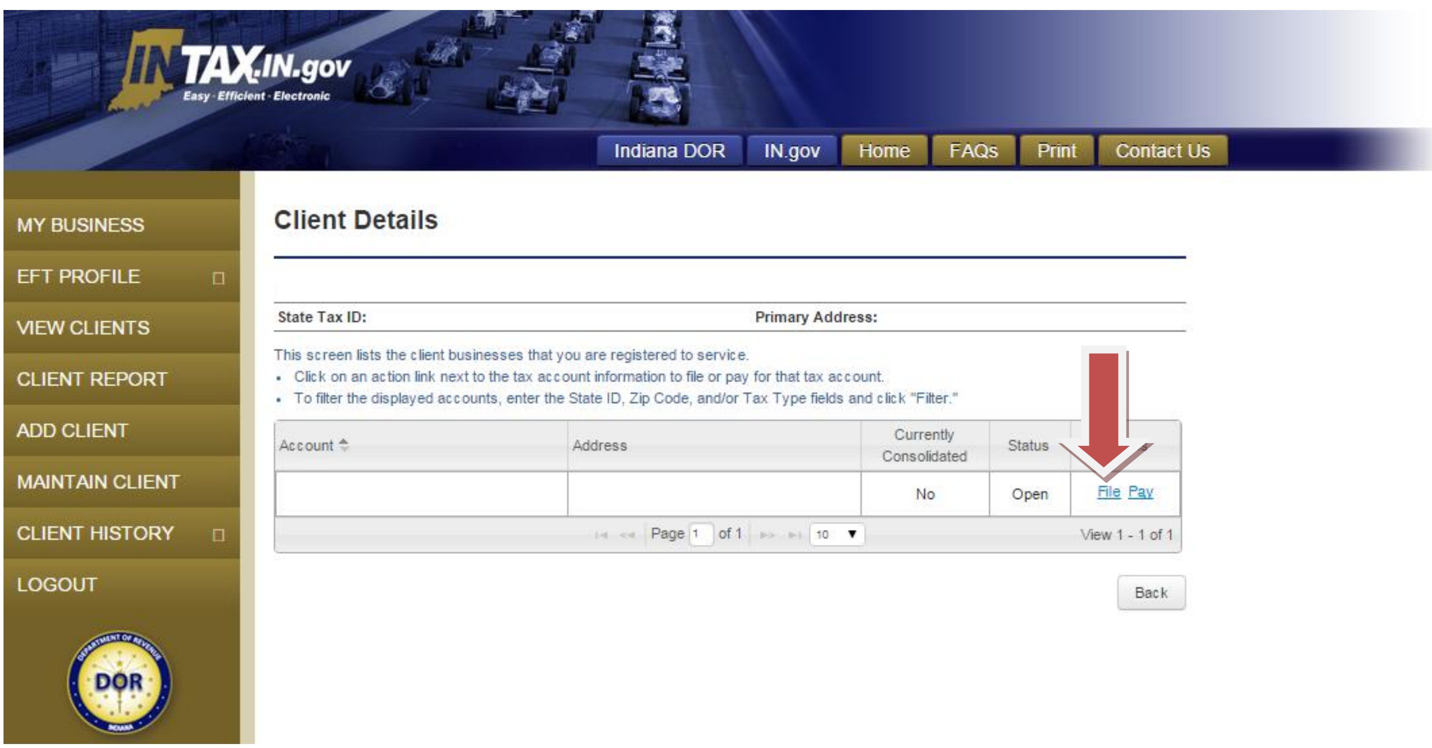
File a return

To access the Client List page, select View Clients from the left navigation menu.

Step 1: Select the name of the business for which you are filing a return.



Step 2: The Client Details page will populate. For the appropriate Account row, select **File** in the Actions column**.**



Step 3: The following pages may vary depending on the type of return you are filing.

For some tax type accounts, you will be asked for additional information to determine which form you want to file. Select **Continue** to proceed.

Enter a valid period end date. Select **Next** to proceed. *Note: This is the last day of the month/year for which you have collected tax, not the due date of the return being filed.*

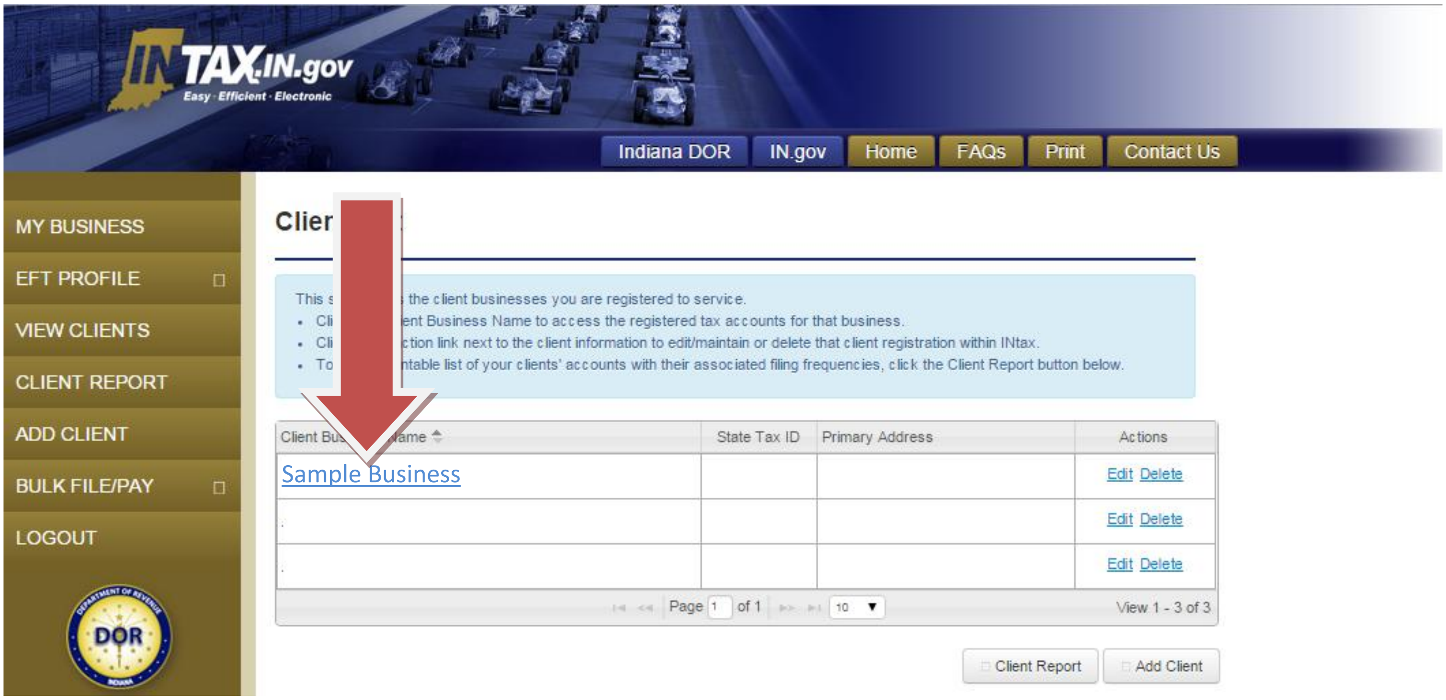
Enter all return information, and then select **Submit.** Don't forget to check the box at the bottom to declare the amounts displayed on the page are true, correct, and complete.

A Return Confirmation page displays after the return has been submitted successfully. If you are using INtax to remit payments, select **Make a Payment** from the Return Confirmation page. If you are not using INtax to remit payments, your transaction is complete.

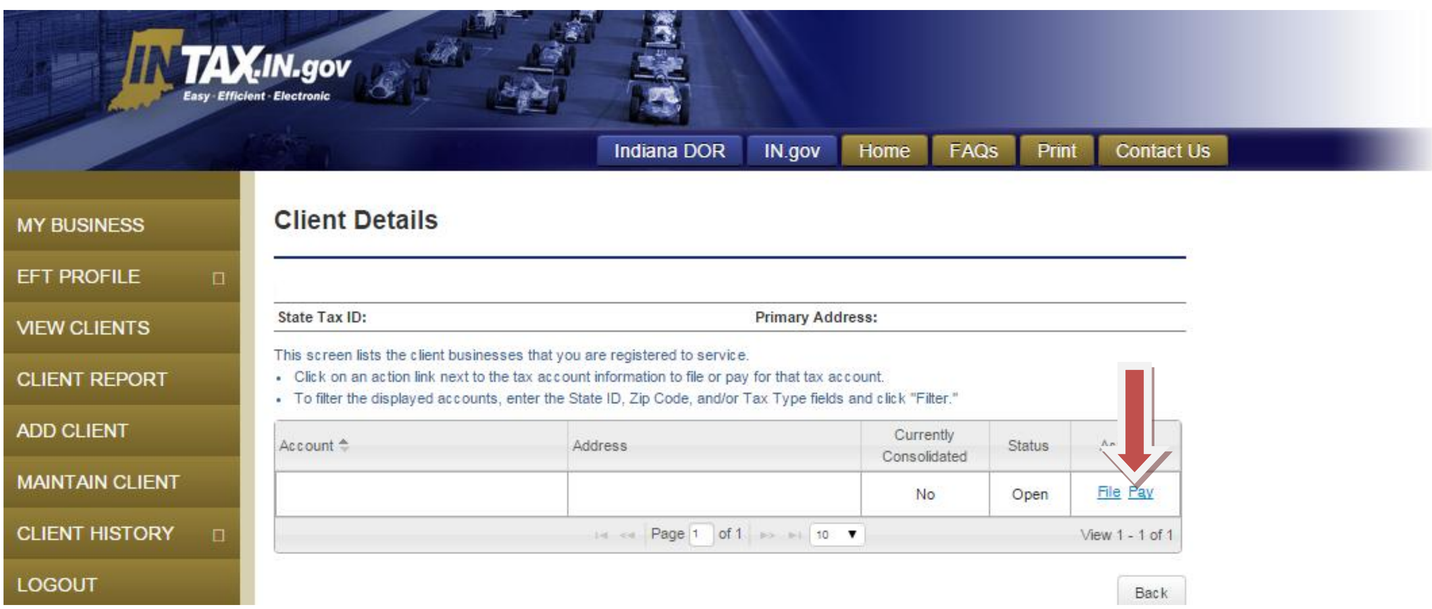
Make a payment

To access the Client List page, select View Clients from the left navigation menu.

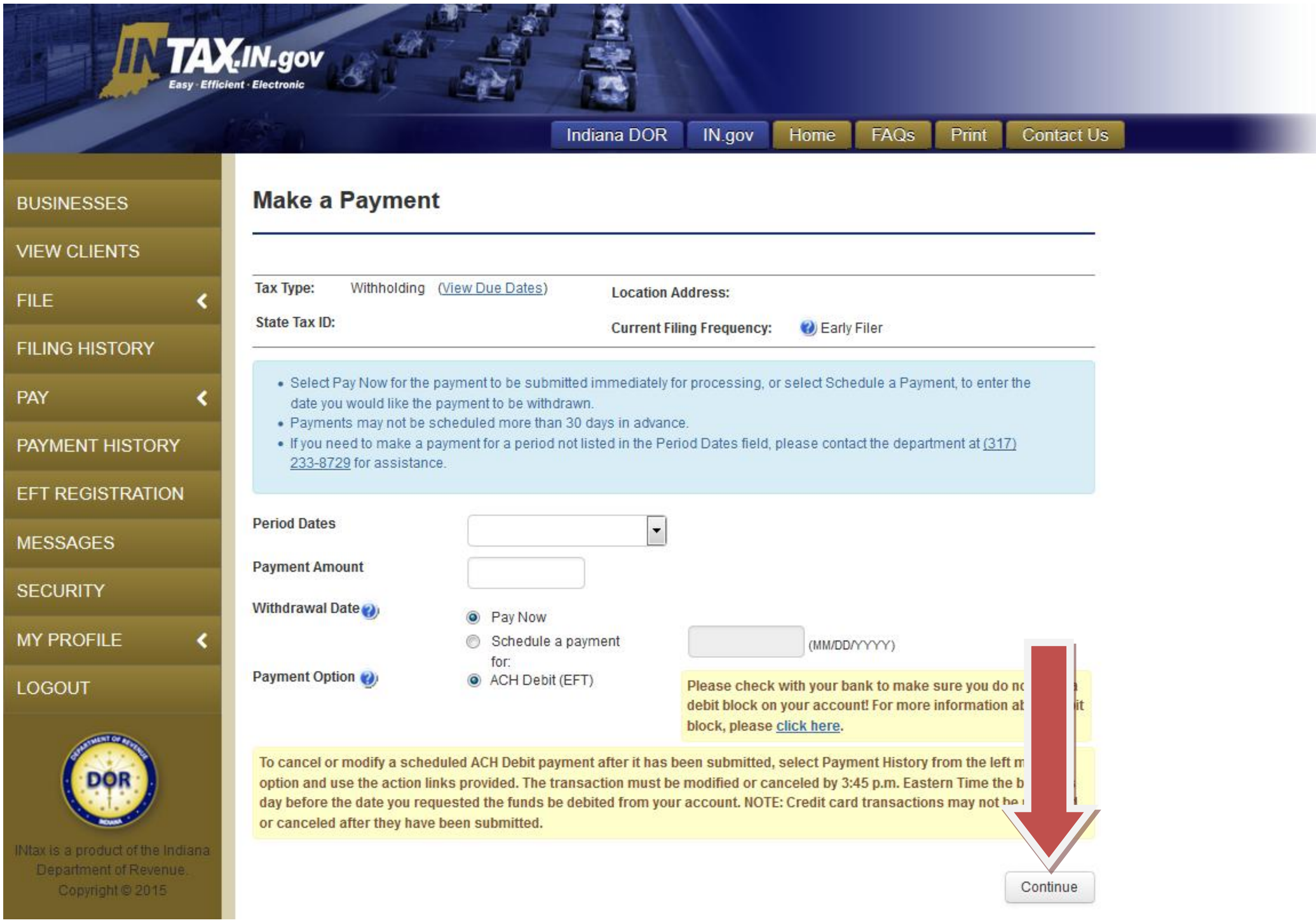
Step 1: From the Client List page, select the name of the business for which you are making a payment.



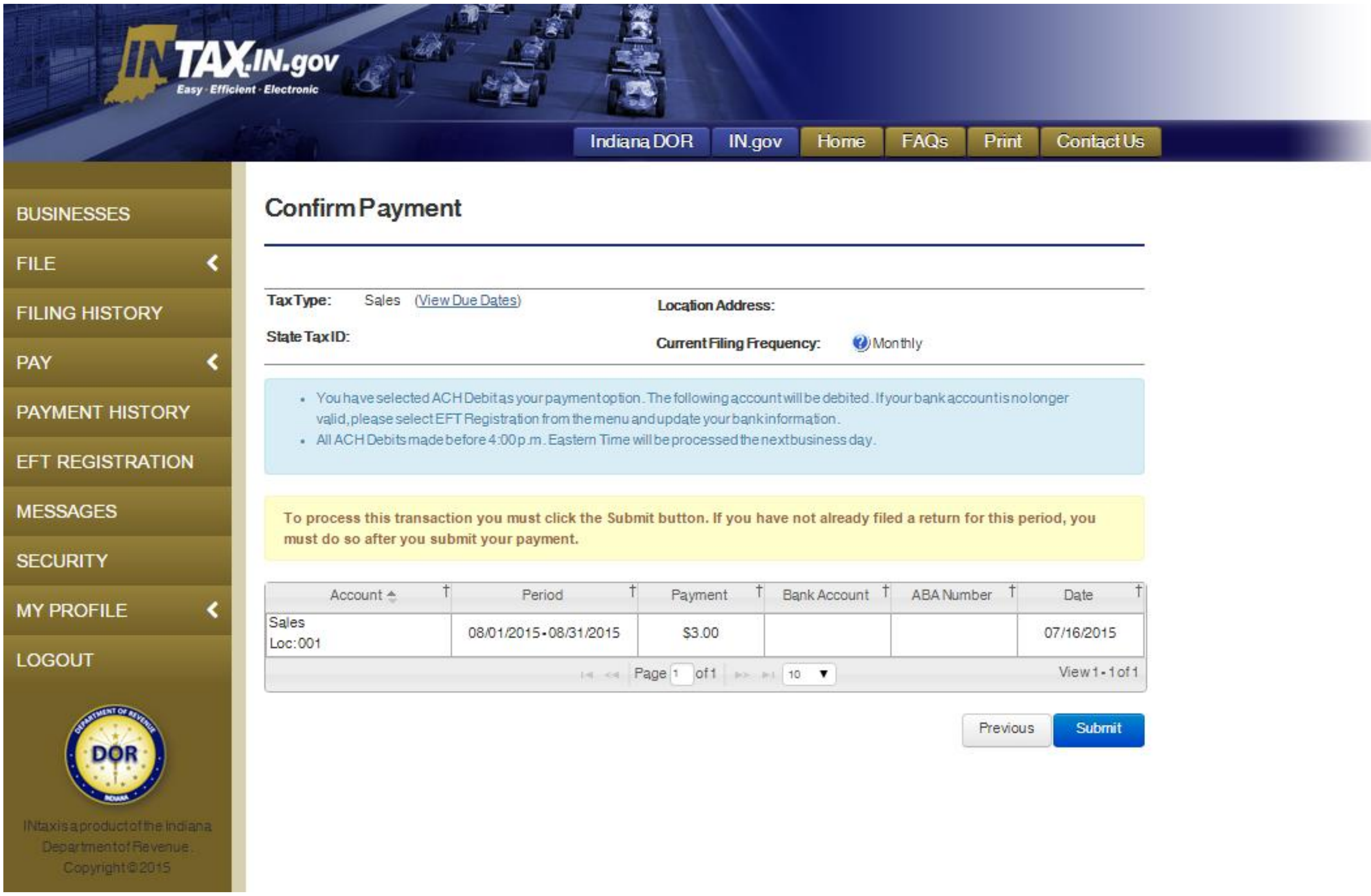
Step 2: For the appropriate Account row, select **Pay** in the Actions column.



Step 3: Enter the payment information. Select **Continue.**



Step 4: Review the Confirm Payment page. If the payment information is correct, select **Submit.** If changes need to be made to the payment, select **Previous.**



A Payment Confirmation page displays after the payment has been submitted successfully. If you have not filed the return, select **File Return** from the Payment Confirmation page. Depending on the tax type, INtax may populate the form with information or you may have to choose the form type.

Bulk filing options

Bulk filing is a popular method used by service providers to ease the filing and paying process for withholding tax. Before continuing, it is important to determine which method fits your needs best.

If your software creates a properly formatted file with all of your client information, you can upload the file in INtax. All clients included in the file must be listed as clients in INtax. If you have a client in the file that you have not added to INtax, you will receive a message stating that the taxpayer was not found.

Form WH-3

- Form WH-3 can be bulk filed in INtax if there are fewer than 3,500 employee withholding records in the file. *Note: This does not mean fewer than 3,500 employees but fewer than 3,500 records. The file likely will contain other records for federal filing and perhaps other states, so the total number of employees in the file typically will be far fewer than 3,500. The maximum file size allowed is 2MB.*
- If your file contains more than 3,500 records and is larger than 2MB, you must use the FTP method to bulk file. For more information on submitting bulk files via FTP, see the bulk upload guide at www.in.gov/dor/4035.htm.

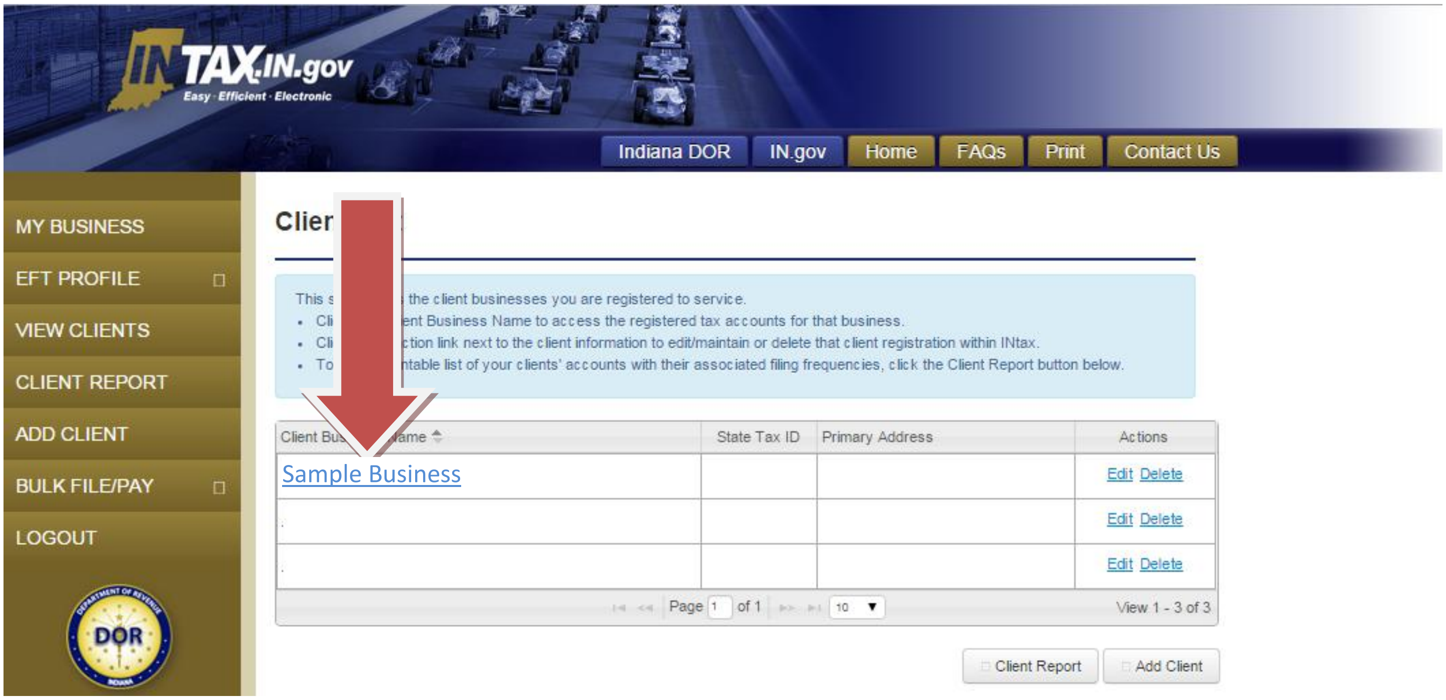
Form WH-1

- If you have fewer than 25 clients, INtax is the most convenient filing method for Form WH-1. You still can submit a bulk payment through INtax, which will allow you to avoid the FTP setup and certification requirement.
- If you have more than 25 clients, bulk upload offers a convenient way to file Form WH-1. Bulk upload filing requires your file to be in XML format and submitted via FTP. For more information on submitting bulk files via FTP, see the bulk upload guide at www.in.gov/dor/4035.htm.

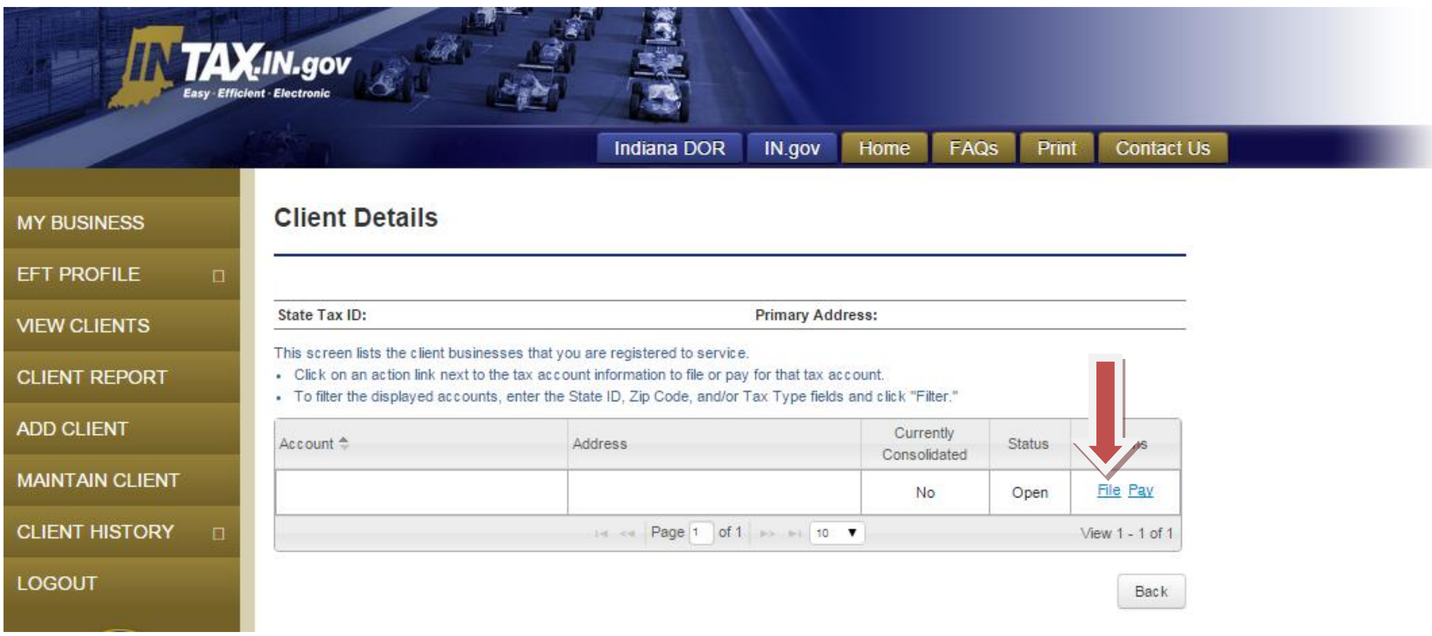
Bulk filing Form WH-3 in INtax

To access the Client List page, select View Clients from the left navigation menu.

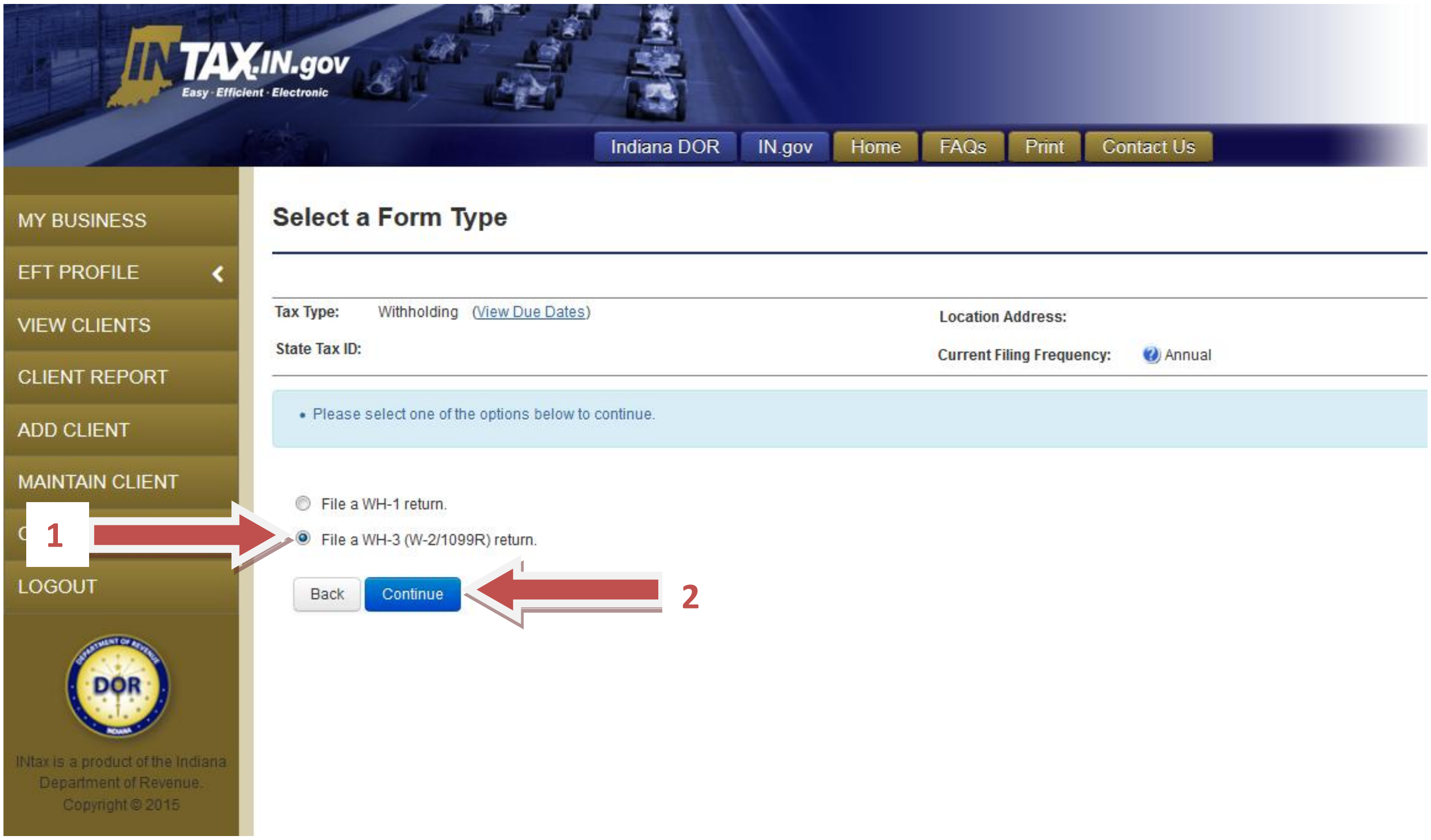
Step 1: Select the name of the business for which you are bulk filing.



Step 2: From the Client Details page, select **File.**

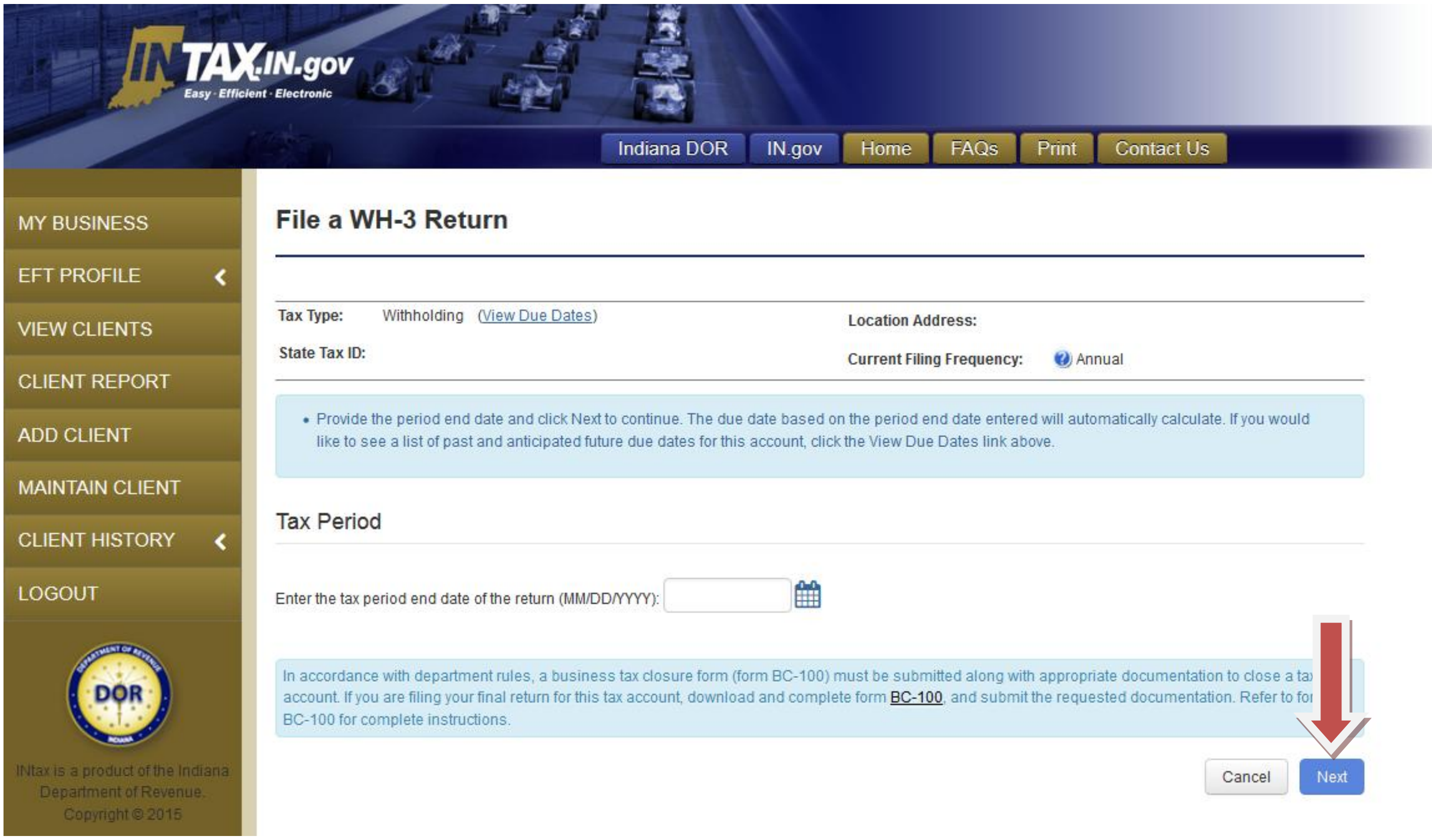


Step 3: Select "File a WH-3 (W-2/1099R) return" (see arrow #1 below), then select **Continue** (see arrow #2 below)**.**

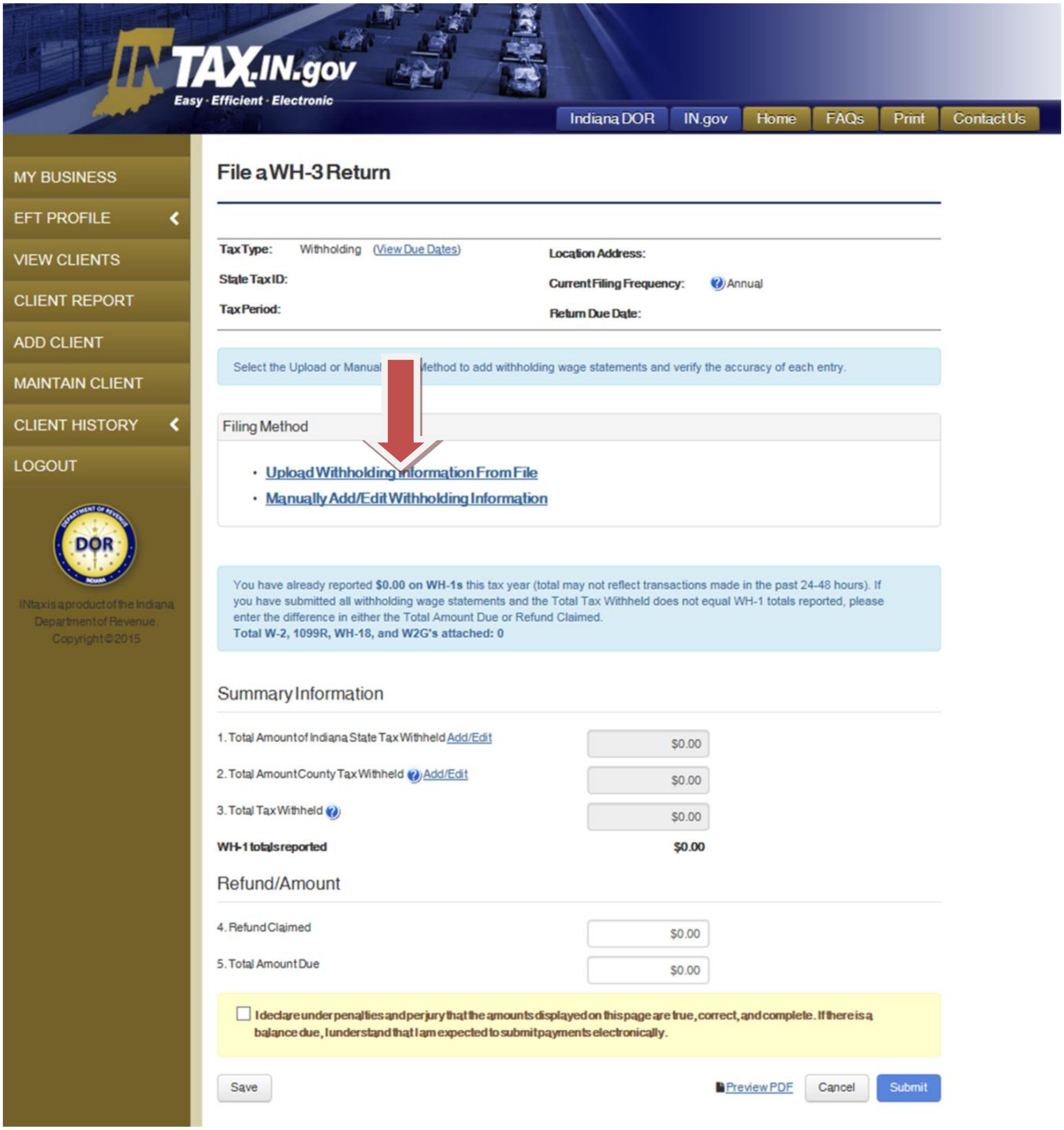


Step 4: Using the drop-down calendar, select a valid period end date. Select **Next.**

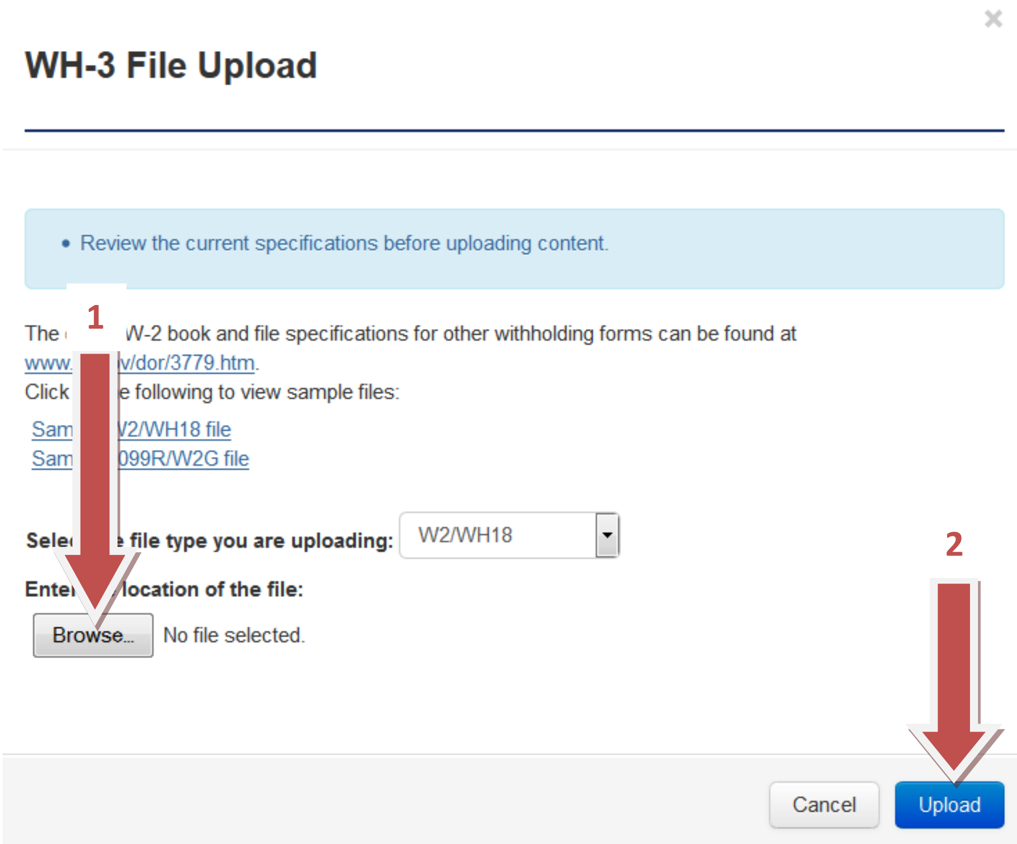
Note: This is the last day of the month/year for which you have collected tax, not the date of the return being filed.



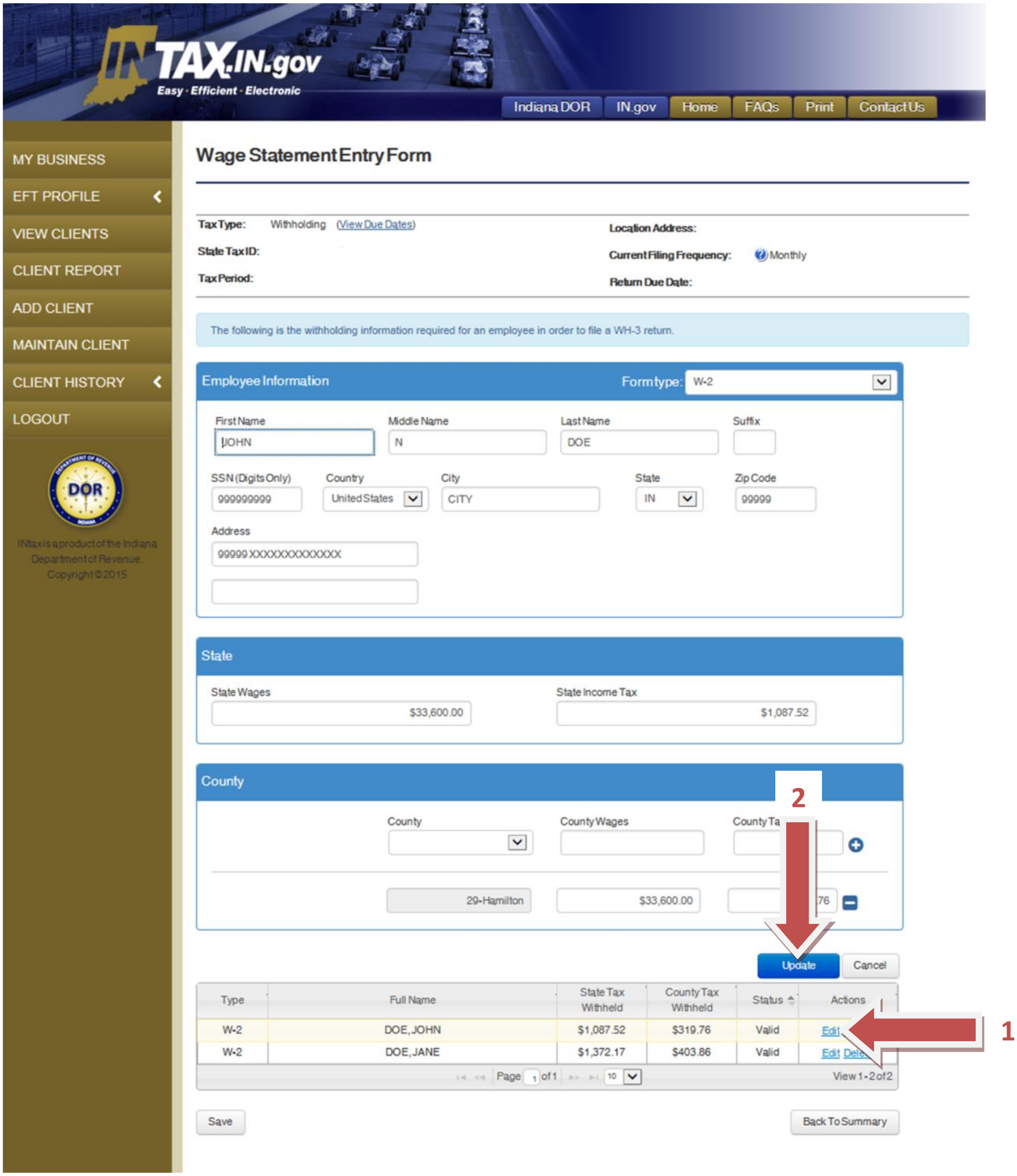
Step 5: In the Filing Method box, select **Upload Withholding Information from File**.



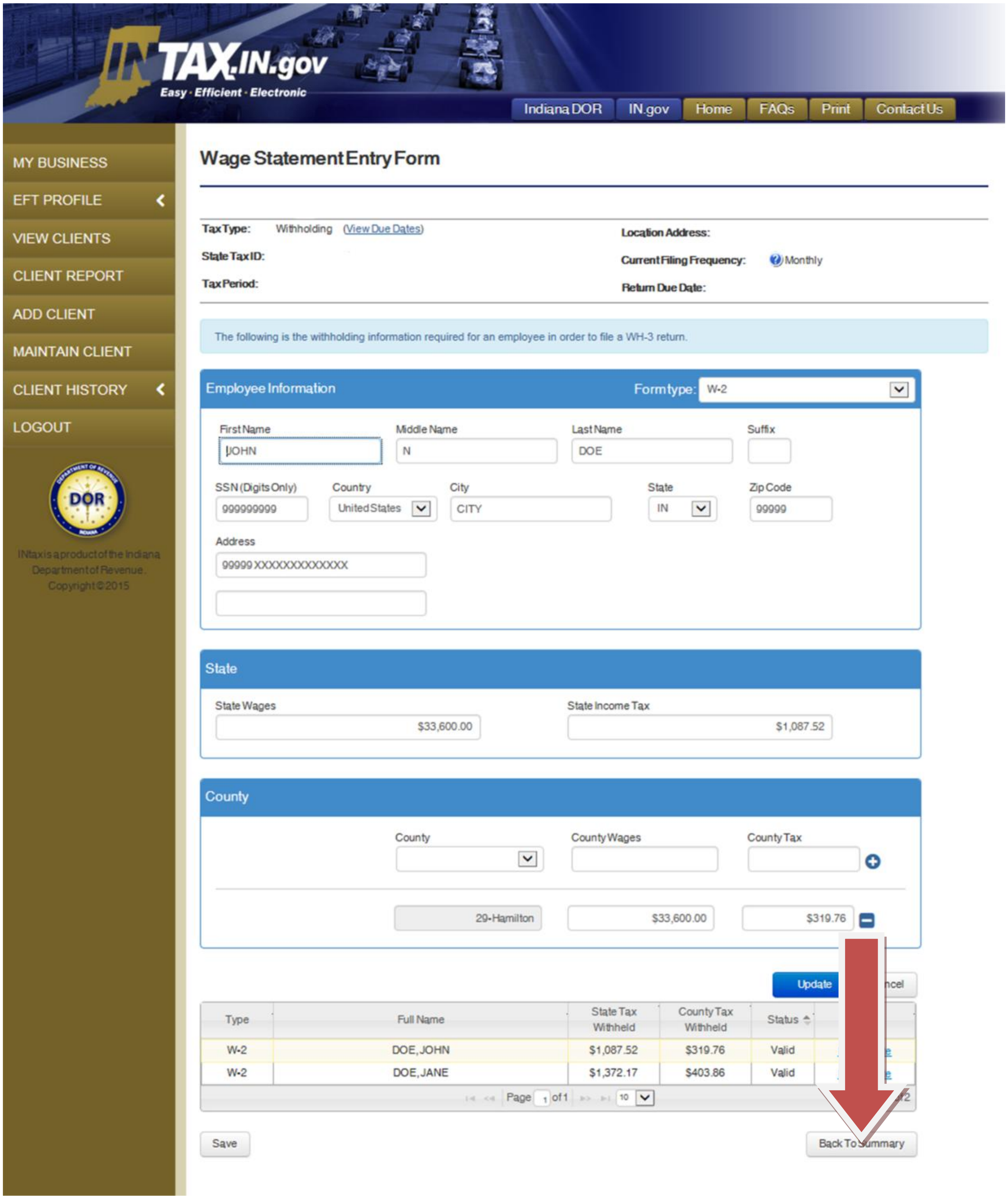
Step 6: Select the type of file you are uploading from the dropdown box. Select **Browse** (see arrow #1) to select the file from your computer you would like to upload. Then, select **Upload** (see arrow #2)**.**



Step 7: Each entry in the file is displayed. If a record is not valid, the status will be marked Invalid in red. All records must be corrected or deleted before the returns can be submitted. In the Actions column, select **Edit** (see arrow #1 below) for the record you need to correct. The data for the selected record will display in the Employee Information, State and County sections. Make any necessary corrections and select **Update** (see arrow #2 below) to save the corrected information to the record.



Step 8: Once all return records are valid, select **Back to Summary**.



Step 9: Enter the Refund Claimed and Total Amount Due. Select the box verifying that the information is correct, and then select **Submit** to complete the bulk filing.

Additional resources

Online resources for tax professionals

- FAQs: www.in.gov/dor/3806.htm
- Tax Library: www.in.gov/dor/3330.htm
- *Tax Dispatch* (the department's tax professional newsletter): www.in.gov/dor/3659.htm
- Inquiry Center: www.in.gov/dor/3863.htm
- Webpage: www.in.gov/dor/3338.htm

Get connected to receive department news and notices

- Like us on Facebook: www.facebook.com/pages/Indiana-Department-of-Revenue/270352606668
- Follow us on Twitter: www.twitter.com/INDeptofRevenue
- Sign up for automatic email updates: www.in.gov/dor/3937.htm

Contact the department on the tax professional hotline

But if you have a question, contact the department's tax professional hotline at (800) 462-6320 and enter 4367 when prompted.

To maintain prompt response times, we ask that you not share the tax professional hotline number with your clients. If your clients have questions about using INtax, please have them call (317) 233-8729.